DOCUMENT RESUME

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INSTITUTION Trenton Public Schools, N.J.
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IDENTIFIERS Elementary Secondary Education Act Title III; ESEA Title III; *Planning Programming Budgeting Systems; PPBS

ABSTRACT

This report, a clear statement of how one district developed a planning system, offers both a theoretical and a practical approach to providing the superintendent, his staff, and the board of education with a comprehensive planning system instrument for making policy decisions and allocating resources. Also provided are guidelines for involving the community, its agencies, the students, their parents, and the instructional staff in decisionmaking and implementation regarding educational priorities. Additional guidelines are included for reorganizing the planning and data collection services of the system under a director of planning. (Author)

ED057457

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BUILDING A COMPREHENSIVE PLANNING SYSTEM MODEL WITH EPPBS

EA 003 846

A Title III, ESEA Project, Trenton Public Schools

Dr. Ercell I. Watson
Superintendent

Dr. David E. Weischadle
Director
Trenton Public Schools
South Stockton Street
Trenton, New Jersey 08611

FOREWORD

The document which follows is the continuation grant request for our second year's funding. More important, it is also a record of the first year's achievements. It is, therefore, being made available in this form to indicate progress to this date.

Our effort began on October 1, 1970. We have made substantial progress as indicated in the attachments. But more progress needs to be made. Carefully stated in this document are the objectives to be achieved this year. They are indeed challenging.

Trenton Public Schools have taken an important first step toward improving educational planning. Hopefully, the gains will be seen in more effective programs for our youngsters.

David E. Weischadle
April 30, 1971

Part I

Statistical

NJ SEA 0009

PART I - STATISTICAL INFORMATION

A. PROJECT REVIEW AND APPROVAL (To be completed by State educational agency)

Proposal No.	County Code	Cong. District	Approval Date	Budget Period

Signature (Authorized SEA Official)	Project No. Assigned	Total Amount Budgeted $ / Planning Grant Award $

B. PROJECT INFORMATION (To be completed by applicant)

REASON FOR SUBMITTION OF THIS FORM (Check one)

A ☐ INITIAL APPLICATION FOR TITLE III GRANT OR RESUBMISSION

B ☒ APPLICATION FOR CONTINUATION GRANT

C ☐ END OF PROJECT PERIOD REPORT

Authorized Representative (Name and Title)	Telephone (Area Code and Number)
Dr. Ercell I. Watson, Superintendent	(609) 396-7646 Ext. 200
Applicant (Legal Name of Agency)	**Contact Person (Name and Title)**
Trenton Public Schools	Dr. David E. Weischadle, Dir. of Planning
Mailing Address (Street, City or Town)	**Mailing Address**
9 S. Stockton St., Trenton	9 S. Stockton Street, Trenton 08639

State	County	Zip Code No.	Telephone No.
New Jersey	Mercer	08639	(609) 396-7646 Ext. 347

Project Title (Seven words or less)
Building a Comprehensive Planning Capability Model with EPPBS

C. PROJECT BUDGET SUMMARY (To be completed by applicant)

	PREVIOUS OE GRANT NUMBER	BEGINNING DATE (Month, Year)	ENDING DATE (Month, Year)	FUNDS REQUESTED
Initial Application or Resubmission				$
Application for First Continuation Grant	70-079	July 1971	June 1972	$ 83,520
Application for Second Continuation Grant				$
Total Title III Funds				$ 83,520

D. CERTIFICATION (To be completed by applicant)

I HEREBY CERTIFY that, to the best of my knowledge, the information contained in this application is correct; the agency named below has authorized me, as its representative, to file this application.

_____ _____ 19____

Signature of Person Authorized to Receive Grant — Date

a. Pupil membership by grade for the total coverage of this project and the specific student population to be served.

LEVELS	Number in membership in Public School	PUPILS IN AGENCY'S DISTRICT			
		Estimate number of pupils by grade, who will participate in this project.			
		Regular School Term Program		Summer School Term Program	
		(unduplicated counts)		(unduplicated counts)	
		Public Schools	Nonpublic Schools	Public Schools	Nonpublic Schools
Pre-Kindergarten	294	294			
Kindergarten	1402	1402			
1	1450	1450			
2	1514	1514			
3	1408	1408			
4	1328	1328			
5	1322	1322			
6	1349	1349			
7	1297	1297			
8	1211	1211			
9	1180	1180			
10	1020	1020			
11	1054	1054			
12	838	838			
Ungraded Elementary	379	379			
Ungraded Secondary	269	269			
TOTAL	17,315	17,315			

b. Number of school age children, by pupil population groups, that are in the area of coverage of this project.

(The same child or school may be counted in more than one population group)

PUPIL POPULATION GROUPS	Estimated number of children, ages 5 through 18 in agency's district (1) who can be described by the specified descriptors, and (2) who are enrolled in public and private schools in the district or who are eligible for enrollment but not enrolled in any school.	Estimated number of pupils from selected pupil population groups who will participate in this project.		Number of Schools in which project will be conducted.	
		Public Schools	Nonpublic Schools	Public	Nonpublic
Children from low-income areas	25,340	14,600			
Handicapped children	200	200			
Nonstandard English speaking children	1,155	1,155			
Migrant children		-			
Neglected and delinquent children		-			
General elementary secondary population children (not included in above groups)		2,700			
Former out-of-school youth, dropouts		354			
Adult basic education		599			
Other adults		530			
Number of children (ages 5 through 18) residing in the district from families with less than $2,000 annual income.	3,000 (est)				

a. School membership (on or near October 1), and project participants.

School Membership and Participants by Control of Schools		Number of Children				Adults (excluding teachers receiving inservice training & Proj. Staff)	Teachers who receive inservice training	Totals
		Pre-Kindergarten	Kindergarten	Other Elem.	Sec.			
a. Membership of schools served by Title III projects (on or near October 1)	(1) Public schools	294	1402	8747	6869			17,315
	(2) Non Public schools							
b. Number of persons participating in Title III projects	(1) Public schools	294	1402	8747	6869			17,315
	(2) Non Public schools							

b. Number and percent of children who will participate in this project, by selected groups.

	Negro American		Indian American		Oriental American		Spanish-Surnamed American (Mexican, Puerto Rican, Cuban descent)		Caucasian		Other	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Number of Participants	11,790	69	0	0	0	0	1246	5	4241	25	28	1

NOTE: The sum of the numbers entered should equal the sum of the number of children in pre-Kindergarten through grade 12 in public and nonpublic schools who will participate in this project. The percents are based on this sum and should add to 100 percent.

c. Rural/Urban distribution of children who will participate in this project.

PARTICIPANTS	Rural		Standard Metropolitan Area		Other Urban	Total
	Farm	Non-Farm	Low-Socio-Economic Area	Other		
Percent of total number served (Based on totals given in item 1b)	0	0	90	5	5	100

NOTE: The percents are based on the sum of the number of children in pre-Kindergarten through grade 12 in public and nonpublic schools who will participate in this project.

d Number of Title III project staff. Include only those staff members paid wholly or partially with Title III funds.

TYPE OF PAID PERSONNEL by Function	Number of Staff Assigned to Project		
	Full-Time in Function	Part-Time in Function	
		At least half-time, but less than full-time	Less than half-time
A. Administrators and/or supervisors	1		
B. Teachers:			
(1) Pre-Kindergarten			
(2) Kindergarten			
(3) Other Elementary			
(4) Secondary			
(5) Other			
C. Subject-matter specialists (Artists, Scientists, Musicians, etc.) other than regular teachers			
D. Technicians (Audiovisual, Computer Specialists)	1		
E. Pupil personnel workers (Guidance, counseling, testing, school psychological services, attendance and school social work			
F. Health services personnel (Medical, psychiatric, dental)			
G. Researchers and evaluators			
H. Planners and developers			
I. Disseminators (Writers, Public Relations Personnel, Editors, etc.)			
J. Other professional			
K. Para-professional education aides, etc.			
L. Other nonprofessional (clerical, pupil transportation, food services, etc.)	1		

Part II

Narrative

Project Title: Building a Comprehensive Planning Capability Model with EPPBS

Applicant Agency: Trenton Public Schools

Project Number: 70-079 Budget Period July 1971-June 1972

I. Evaluation

A. Attach the evaluation of the current budget period of your project, prepared in accordance with your design for evaluation, submitted as part of your previous application.

The evaluation scheme in the original proposal was indeed sparse in terms of effective methods to evaluate the project. It became one of the first tasks of the project director to develop an evaluation plan for the project. That plan is included in the attachment, under the heading EVALUATION.

The plan includes evaluation procedures for each of the six tasks outlined in the initial proposal. These tasks are performance oriented and thus measureable.

The proposed plan was developed in February of 1971 and called for both a continuous and item approach to evaluation of the project. The prime tool for the continuous evaluation is the division log, which provides the director and others with an instant picture of overall activities.

In several cases, e.g., staff orientation and council membership, survey instruments were developed. These items are still being received as of this writing and have not been completely analyzed. A full evaluation report is to be completed before June 30, 1971.

Important instruments of evaluation have been the Technical Task Force and the local Coordinating Council. Both these units have served as clearing houses for reports and procedures of both the project director and the consultant.

The On-site Evaluation Team, New Jersey Department of Education, also provided the outside, independent evaluation of the project which is needed in terms of perspectives. This report, included in the attachments under the heading ON-SITE EVALUATION REPORT, indicates clearly that the project is proceeding on the right track and meeting its task objectives.

B. Describe briefly one activity which exceeded your expectations, one you consider average, and one which did not measure up to your expectations.

1. In order to gain an understanding of how the interested citizens of Trenton view their school, the project developed a Trenton Community Opinionnaire. This opinionnaire asked the adult population of the city to state their views, which would then be

used later to develop priorities for the planning process. Both local newspapers agreed to publish and support the effort by printing the Opinionnaire and related stories at no cost to the project or local Board. Government Studies and Systems agreed to handle the processing of the Opinionnaire for computer tabulation. At this writing, nearly 2500 Opinionnaires have been returned. On the basis of the number of families in the city, approximately 25,000, the returns appear to be substantial.

The information collected will be compiled and interpreted by the Office of Planning. Assisting in this effort will be the Technical Task Force and the Coordinating Council, and possibly an outside concern such as Opinion Research Corporation who also assisted in the original design.

In addition to this survey, another activity of substantial success has been the operation of the Technical Task Force.

2. The orientation of the administrative and supervisory staff must be considered average in terms of success. The numbers attending the sessions were substantial and their attention was generally good. Their participation in question and answer periods also indicated that they wished to know more about how EPPBS will affect them. Being introductory orientations, the sessions were theoretical at times in order to provide an adequate background in terminology and approaches. The staff participating were asked to complete a questionnaire, sent to them after the sessions. These are still being returned and processed.

3. The Trenton school district has had several major interruptions during the 1970-71 school year. Violence following a bussing plan closed the school in October. A teacher strike in February disrupted many schools and closed others. It became obvious that schools could not be closed in order to provide for several staff days. The local administration decided that a proposal to evaluate teachers had to be aired before the teachers in April, a program already postponed from March. Calling for early release time, the program provided three days of workshops. It was highly impractical, and unfair to the youngsters, to have another such program in May for EPPBS.

In order to insure that EPPBS is understood by the staff and accepted as worthwhile, the staff must be oriented in a setting which allows for smooth explanation and responsive questioning. It was decided that such a three-day session will be held in September or October of 1971, when school resumes. Plans are already set. In order to insure that staff member are informed, the project will distribute a local newsletter and a copy of 'PPBS - A Primer" to each teacher and staff member (SEE COPY IN ATTACHMENTS), under the heading LOCAL ORIENTATION.

C. Based on your local evaluation, what changes, if any, are being made in your project.

Based on local evaluation, and buttressed by the On-site Evaluation by the State, it seems extremely urgent that the local staff

hire its systems analyst, to be called EDP Coordinator, on a full time basis for Year Two. In the initial proposal, this staff person would be hired on a half-time basis for that fiscal year. Several factors lead to this change:

a. It would almost impossible to find an EDP Coordinator willing to work on a half-time basis.

b. The project would be greatly hampered if it had to wait a whole half year to hire a man full time.

c. In spite of a short project year for year one (October to July 1971), the project is ready for the work of this man to begin.

d. The Borad of Education has allocated local funds for computer equipment, meaning that programming must begin almost immediately.

Gaining this additional personnel at this point represent the increase in the budget for Year Two. This increase is small in terms of the anticipated gains. It would be certainly more expensive to delay this move at this time in terms of the project's goals and achievements.

D. If the State Department of Education has conducted an on-site evaluation of your project during the current budget period, describe any modifications being made in your project based on the recommendations contained in the On-site Evaluation Report.

In the Attachments, under the heading ON-SITE EVALUATION REPORT, a copy of the project director's response to the Report is included. The recommendations, on the whole, coincided with manu of changes which were already in process at the time of evaluation. The director's responses reflect the fact that only a minimal amount of change in the project can be expected in terms of city government and its budgetary activities.

E. Include additional comments concerning the operation of the project during the current budget period that may be relevant to evaluation.

During this project year, the Office of Planning has become an integral part of the Trenton Schools. The office has been included in such activities as teacher evaluation, principals' evaluation, local research activities, technical assistance, and program development. The office was particularly useful in developing several aspects of the revised proposal for Trenton's Title VIII project, specifically in the area of up-dating the needs assessment and developing a cost effectiveness/benefit mode.

In addition, the office became the coordinating element for the national Consolidated Program Information Report (CPIR or Belemont Evaluation) and the Elementary School Survey. This office was also involved in the preparation of the most recent budget for Trenton Public Schools.

II. Dissemination

A. Discuss how the project information was disseminated. Identify audiences, methods, etc. Include representative samples of major dissemination releases. Where applicable, cite examples of how the project influenced and/or was replicated or adapted by other educational institutions.

It was also a prime task for the project director to establish a dissemination plan for the project. That plan is included in the Attachments under the heading DISSEMINATION. In addition, copies of the project's dissemination efforts are also contained therein.

The major dissemination efforts included:

a. Contact and exchange of information with professional, management, planning, and education groups. Techniques used include a contact letter, summary statements, and personal meetings.

b. Relationship with other districts using PPBS. Used letter and personal visit techniques.

c. Individual activities, e.g., the Trenton Community Opinionnaire involved a wide variety of dissemination techniques, such as,

1. Newspaper stories
2. Radio spot announcements
3. Radio statements by the project director for radio
4. Letters to staff

B. If your project has prepared any dissemination products, such as vedio tapes, curriculum guides, movies, etc., which may be of value to other districts, please describe each briefly and, if practical, submit one copy with this report.

All materials are included in the attachments.

Year Two appears to be the prime time to begin a much larger dissemination program. In order to accomplished this task, the project is now planning:

a. Ten issues of a project newsletter, entitled RPE NOTES, for distribution within the system and outside.

b. A series of cassette tapes available to local staff and other to explain PPBS and the local efforts.

c. A brochure describing the activities of the project.

These efforts are in addition to the general activities as outlined in the proposed dissemination plan included in the Attachments.

III. Project Relationships

A. Report the effect of the project on the education institution or agency by discussing what you consider to be the greatest change resulting from the project.

Indications are that the greatest impact on the instructional staff, particularly administrative and supervisory personnel, is that of an awareness to the value of a system approach to planning and allocation of human and financial resources. Few in the district had even considered the approach or were aware of the details. The project has had as a major task the orientation of local staff. In the sessions, this awareness was promoted and extented. All staff addressed were invited to seek out more information and involve themselves in the development of a planning system.

Another impact seemed to be one of added impetus to the business office which has been seeking to reorganize and develop more sophisticated bookkeeping method. A key aspect of this reorganization is the development of a computer system. With the anticipated development of a Planning Information System, it was obvious to the business office and the Board of Education that new methods had to be evolved to meet these new planning techniques.

B. Briefly report on the role which the Advisory Council has played during the current budget period. Include a list of current members, numbers of meetings held, major agends topics, and effects on project. Attach a copy of the End of Budget Period Report prepared by the Advisory Council if one was prepared.

The project has two councils supporting its activities. The prime council is the Technical Task Force (TTF), made up of representatives of major educational and community organizations have an interest in Trenton Public Schools. A list of members, a statement of purpose, and agendas and reviews of all meetings held are included in the Attachments, under the heading TECHNICAL TASK FORCE.

The prime effect of the TTF was seen in the development of an instrument to survey the community. The Trenton Community Opinionnaire was a direct product of the Technical Task Force. It has also been the practice of the Project Director to inform and open for discussion all activities of the project, as indicated by the topics listed on the included agendas.

The other council assisting the project is the Coordinating Council, made up of senior administrators in the system. This Council serves as a steering committee. A list of members, a statement of purpose, and the agenda of meetings are included in the attachments, under the heading of COORDINATING COUNCIL.

The effect of this Council is difficult to pinpoint for it has been an integral part of the project's development.

C. Report the effect of the project on the cooperating agencies by (1) listing the community agencies that cooperated in the project; (2) discussing the results of such cooperation; (3) listing local educational agencies and counties which have served by the project and indicate any changes since the initial application.

The project has had substantial cooperation from the wide range of organizations who are represented on the Technical Task Force. The effect seen here is one that is mutual, in that there is an interacting effect. Our activities are based on the activities or experience of the other groups or agencies.

It is still too early to pinpoint specific impact or changes that have been realized as a result of the project. As each member of the Technical Task Force is surveyed, the impact will become much more clear.

IV. Project Plan Modifications

A. Describe any planned changes in your project evaluation design.

Each of the five task streams of the project contains a set of evaluative activities, related to its own objectives. While the specific evaluative activities are described in section IV D., they may be conceptualized in the following schemes:

Task Stream I: Citizen Participation in Strategic Planning Evaluation: Collection of documentation on the frequency, intensity, and scope of community participation in strategic planning.

Task Stream II: Agency Participation in Strategic Planning Evaluation: Collection of documentation on the frequency, intensity, and scope of community participation in strategic planning.

Task Stream III: Orientation and Training Evaluation: Each orientation and training program has cognitive objectives; the instructors evaluate the effect of the program on the participants.

Task Stream IV: System Design Evaluation: Each of the subsystems in the planning system is reviewed, refined, and de-bugged until it performs its appropriate function to the satisfaction of the planners.

Task Stream V & VI: Administration, Evaluation, Dissemination

Evaluation: The management files of the project document the scope and appropriateness of the project administration, particularly vis. the performance sub-contract with Government Studies & Systems, Inc.

B. Describe any planned changes in project staffing: (1) For new positions indicate reasons for the addition, responsibilities, qualifications, salary per month, percent of involvement, and date of commitment. (2) For positions which are being substantially modified, indicate the title, responsibilities, and reasons for the change.

There will be one professional employee added to the project staff: Coordinator of Data Processing--Office of Planning.

The principal responsibility of the Data Processing Coordinator will be to manage the extenxive data gathering, file-loading, maintenance, and up-dating activities needed to support the system. Further, all ad hoc computer programs required for the office of planning will be written by the Data Processing Coordinator. (The information system design and programs for all routine reports will be provided by the sub-contractor.)

Generally, the Data Processing Coordinator will execute all the data management tasks required by the planning system design, and, over the years upgrade the use of data in Trenton's planning and administrative functions.

The requirements for the position will be:

-Fortran and COBOL programming
-Intermediate level statistical skills (ANOVA)
-B.S. (or equivalent) in computer technology or related discipline; or 4-6 years EDP experience in similar assignments.

Salary: 15,000/year.

C. Describe any change in the methods or procedures planned for assuring that the project will be carried forward without federal support, after the designated approval period.

1. The Project Director has been assured that he will be retained by the Board as Director of Planning beyond the Federal funding period.

2. Important measures are already being taken to develop the staff of the Business office, so that by the end of the Federal funding period it will have the capability to conduct the budgetary analyses required for the Planning-Programming-Budgeting System.

D. Projected New Activities:

1.0 Needs--There is a need to continue and expand the activities of the general community in developing and operating Trenton's Strategic planning system.

1.1 Objective--The general adult population will present its educational preferences and opinions through the annual community opinion survey.

1.1.1 Procedures for the annual opinion assessment process will be developed by the project staff.

1.1.2 Forms, procedures, and analysis routines will be developed by the project team as a basis for future community opinion assessments.

1.2 Objective--Representative community persons will participate in the operation of the "project design teams" which generate program alternatives for the planning process.

1.2.1 Project design teams will be identified and incorporated through administrative policy.

1.2.2 Procedures for project design will be finalized and presented in a set of project design guidelines and forms.

2.0 Need--There is a need for expanded participation of many agencies and organizations in Trenton in the design and operation of the strategic planning system.

2.1 Objective--Several agencies will participate in the design of the strategic planning system, including: the Trenton Education Association, Federation of Teachers, Administrative Association, Model Cities--Trenton, United Progress, Incorporated, New Jersey Department of Community Affairs, New Jersey Urban Schools Development Council, Research for Better Schools, and others.

2.1.1 The Technical Advisory Group (Technical Task Force) will continue to meet monthly, to discuss problems, review design alternatives, and make recommendations to the administration of the district.

2.1.2 Identified agencies will receive reports and other project documentation on a regular basis.

3.0 Need--There is a need for increased knowledge and competence among district personnel in the concepts and operation of Planning-Programming-Budgeting Systems, and the related decision technology, as a basis for recommending and choosing reationally defensible resource allocation strategies.

3.1 Objective--The entire professional staff of the district will increase in the factual knowledge of the concepts, vocabulary, and benefits of Planning-Programming-Budgeting.

3.1.1 The Board will receive continuing orientation.

3.1.2 The administrative staff of the district will receive continuing orientation and training.

3.1.3 The teaching staff will participate in Planning-Programming-Budgeting presentations and workshops.

3.2 Objective--Those persons who will participate most heavily in the operation of the planning system will receive extended training, and demonstrate their competence in the skills required to operate the system.

3.2.1 Workshops and ad hoc training sessions will be conducted throughout Years Two and Three of the program.

4.0 Need--There is a need for a set of procedures, systems, and technology that will allow Trenton planners to use modern planning system techniques in developing strategic resourc allocation plan for the district.

4.1 Objective--The project staff including the consulting firm, will design, test, and refine all the decision technology required to adapt the Education-Planning-Programming-Budgeting System to Trenton's strategic planning needs.

4.1.1 A revenue forecaster will be designed, tested, and refined.

4.1.2 A manpower-resource-cost forecaster will be designed, tested, and refined.

4.1.3 A planning information system will be designed.

4.1.4 A goal setting procedure will be refined and employed by the Board/Administration.

4.1.5 Project design procedures will be developed, tested, and refined.

4.1.6 Cost-Benefit procedures will be developed, tested, and refined.

4.1.7 Budget-generation procedures will be developed, tested, and refined.

4.1.8 Project monitoring/evaluation procedures will be developed, tested, and refined.

4.1.9 A user's manual including schedules, forms, and procedures will be developed.

Part III

Financial

PART III - FINANCIAL

OE 4351 (REV. 12/66)

BUDGET BUREAU NO. 51-R570.1
APPROVAL EXPIRES 6/30/68

PROPOSED BUDGET SUMMARY/EXPENDITURE REPORT OF FEDERAL FUNDS

Title III, Elementary and Secondary Education Act of 1965 - Supplementary Centers and Services Program

(NOTE: Please read the attached instructions before completing this form)

NAME AND ADDRESS OF AGENCY	PROJECT NUMBER	GRANT NUMBER	STATE
Trenton Public Schools, Trenton, New Jersey	70-079		New Jersey

PART I - EXPENDITURES *(other than construction)*

(Check One) ☒ PROPOSED BUDGET SUMMARY (ATTACH DETAIL SCHEDULES) ☒ ESTIMATED EXPENDITURE REPORT ☐ FINAL EXPENDITURE REPORT

BUDGET PERIOD (MONTH, DAY, & YEAR) BEG. 7/71 END. 6/72

EXPENDITURE ACCOUNTS		EXPENSE CLASSIFICATION								
FUNCTIONAL CLASSIFICATION	ACC'T NO.	SALARIES: PROFESSIONAL	SALARIES: NON-PROFESSIONAL	CONTRACTED SERVICES	MATERIALS AND SUPPLIES	TRAVEL	EQUIPMENT	OTHER EXPENSES	TOTAL EXPENDITURES	NEGOTIATED BUDGET
1	2	3	4	5	6	7	8	9	10	11
1 ADMINISTRATION	100	$ 32,700	$ 5,000	$ 40,750	$ 300	$ 200	$	$ 800	$ 79,750	$
2 INSTRUCTION	200									
3 ATTENDANCE SERVICES	300									
4 HEALTH SERVICES	400									
5 PUPIL TRANSPORTATION SERVICES	500									
6 OPERATION OF PLANT	600									
7 MAINTENANCE OF PLANT	700									
8 FIXED CHARGES	800	$3270	$500						3,770	
9 FOOD SERVICES	900									
10 STUDENT-BODY ACTIVITIES	1000									
11 COMMUNITY SERVICES	1100									
12 REMODELING (IF COSTS TOTAL MORE THAN $2000 ENTER IN PART II)	1220c									
13 CAPITAL OUTLAY (EQUIPMENT ONLY)	1230									
14 TOTAL →		$ 35,970	$ 5.500	$ 40,750	$ 300	$ 200	$ -	$ 800	$ 83,520	$
15 NEGOTIATED BUDGET →		$	$	$	$	$	$	$	XXXXXXXXXXXXXX	$

PART II – CONSTRUCTION EXPENDITURES

(Check One)
- ☐ PROPOSED BUDGET SUMMARY
- ☐ ESTIMATED EXPENDITURE REPORT
- ☐ FINAL EXPENDITURE REPORT

BUDGET PERIOD (Month, Day, & Year)
BEGINNING:
ENDING:

	EXPENDITURE ACCOUNTS	ACC'T NUMBER	AMOUNT	NEGOTIATED BUDGET
	1	2	3	4
1	SITES			
	A PROFESSIONAL SERVICES	1210a	$	$
	B IMPROVEMENT TO SITES	1210c		
2	BUILDINGS			
	A PROFESSIONAL SERVICES	1220a		
	B NEW BUILDINGS AND BUILDING ADDITIONS	1220b		
	C REMODELING (IF $2,000 OR LESS ENTER IN PART II	1220c		
3	ADMINISTRATIVE EXPENSE: (Specify below)	1220		
	A			
	B			
4	LEASING OF FACILITIES			
5	TOTAL →		$	$

PART III – SUMMARY - AUTHORIZATIONS, EXPENDITURES, AND BALANCES OF TITLE III ESEA FUNDS

BUDGET PERIOD (Month, Day, and Year)
BEGINNING: 10/1/70 ENDING: 6/30/71

- ☒ ESTIMATED EXPENDITURE REPORT
- ☐ FINAL EXPENDITURE REPORT

	ITEMS		PART I - EXPENDITURES OTHER THAN CONSTRUCTION	PART II CONSTRUCTION EXPENDITURES	TOTAL
	1		2	3	4
1	AMOUNT AUTHORIZED FOR EXPENDITURE FOR BUDGET PERIOD SHOWN ABOVE →		63,200	-	63,200
	A UNEXPENDED FUNDS FROM GRANT AWARDED FOR PRIOR BUDGET PERIOD	$ -			
	B APPROVED GRANT AWARD FOR BUDGET PERIOD SHOWN ABOVE	$63,200			
	C TOTAL FUNDS AUTHORIZED FOR BUDGET PERIOD ABOVE (SAME AS ITEM 1, COL. 4)	$63,200			
2	EXPENDITURES DURING BUDGET PERIOD SHOWN ABOVE →		$60,200(est)	-	$60,200 (est)
3	UNEXPENDED BALANCE OF FUNDS AUTHORIZED FOR EXPENDITURE DURING BUDGET PERIOD SHOWN ABOVE (ITEM 1 MINUS ITEM 2) →		$3,000(est)	-	$3,000(est)

PART IV – CUMULATIVE TOTALS - GRANT AWARDS AND CASH RECEIVED SINCE INCEPTION OF PROJECT

	ITEMS	CUMULATIVE TOTAL TO DATE
1	GRANT AWARDS	63,200
2	CASH RECEIVED	63,200

THIS FISCAL REPORT IS CORRECT AND THE EXPENDITURES INCLUDED HEREIN ARE DEEMED PROPERLY CHARGEABLE TO THE GRANT AWARD.

SIGNATURE OF PROJECT FISCAL OFFICER: [signature] DATE: 4/23/71

SIGNATURE OF PROJECT DIRECTOR: [signature] DATE: 4/23/71

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A. Explanation of live items.

EXPENDITURE ACCOUNT # 100 - ADMINISTTATION

Expense Class	Name, title, Purpose, or Item	Project time Full	Project time Part	Salary	Budgeted Amount
				$	$
Salaries:					
Professional	Director of Planning	x		17,700	17,700
	EDP Coordinator	x		15,500	15,500
Non-professional	Secretary	x		5,000	5,000
Contracted Services:					
Consultants	Government Studies & Systems		x	40,750	40,750
Material & Supplies					300
Travel					200
Other Expenses: Printing					800
				Total budgeted amount	$79,750

EXPENDITURE ACCOUNT # 800 - FIXED CHARGES

Expense Class	Name, title, purpose, or item	Project time Full	Project time Part	Budgeted Amount
Salaries (fringe benefits)				
Professional	@10%	x		$ 1,600
Non-professional	@10%	x		450
			Total budgeted amount	$ 2,050

B. Explanation of Salries and Items.

1. Salaries--all are based on local salary schedules.

2. Contracted Services--see below, C.

3. Materials and Supplies:

Paper, Bond	$ 70.00
Carbon Paper	24.00
Paper, onion skin	26.00
Paper, duplicating	36.00
Xerox paper	46.00
Envelopes, assorted	34.00
File folders	20.00
General office material	44.00
	$300.00

4. Travel

(2000 @.10 a mile) $200.00

5. Other Expenses--Printing of Continuation Grant request and brochure $800.00

C. Contracted Services.

The moneys allowed under this sub-contract are to pay the direct costs for:

145 man-days of senior research analysts

75 man-days of junior programmer-analysts

all report preparation costs

computer services

travel

In addition to direct expenditures, this contract includes the pro-rated costs of all overhead--facilities, utilities, taxes, employee benefits, and a profit fee.

In keeping with the terms of the agreement between Trenton Public Schools and Government Studies and Systems, the following five deliverables are included as a condition of final payments:

-A report on the manual and automated Planning Information System,

-A report on the modification of the Cost, Manpower, and Indicator Forecaster,

-A report on the Monitoring and Evaluation Procedures,

-A report on the Project Design and Cost-Benefit Analysis Procedures, and

-A report on the Cost-Effectiveness Analysis Procedures.

ATTACHMENTS

DIVISION OF RESEARCH, PLANNING, AND

EVALUATION

BOARD OF EDUCATION
ADMINISTRATION BUILDING
TRENTON, N. J.

DIVISION OF RESEARCH, PLANNING, AND EVALUATION

On September 1, 1970, the Trenton Board of Education established this new division with the appointment of a Director of Research, Planning, and Evaluation. The purpose of the division is the development of a comprehensive planning office to provide data for effective decision making.

An award of $63,200 from the federal government under Title III, Elementary and Secondary Education Act, provides the division with technical assistance from Government Studies and Systems of Philadelphia, Pennsylvania. This organization has the responsibility of providing consultant services for developing an Educational Program-Planning-Budgeting System (EPPBS) as a tool for decision making. The development of an effective comprehensive planning system in Trenton has as its goals extensive citizen, technical, and staff involvement.

For further information, please contact:

Dr. Ercell I. Watson
Superintendent of Schools

or

Dr. David E. Weischadle
Director of Research, Planning, & Evaluation

November 30, 1970

PROJECT DIRECTOR

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VITAE

Dr. David E. Weischadle

6 Ribsam Street
Trenton, New Jersey 08619
(609) 587-3245

Personal Data:

Married former Mary Ann Piscopo of Trenton

Children David II and

Height 5'7" Weight 160 lbs.

Date of Birth October 4, 1941

Current Position: Director of Research, Planning, and Evaluation
Trenton Public Schools
Trenton, New Jersey

EdD Rutgers, The State University, Graduate School of Education, New Brunswick, New Jersey, 1970.
Curriculum Theory and Development

EdM Rutgers, The State University, Graduate School of Education, New Brunswick, New Jersey, 1964.
C & I, Secondary Education, Social Studies.

BS Rutgers, The State University, New Brunswick, New Jersey, 1963.
Social Studies Education, English, and Earth Science

Certifications: Social Studies and English
Supervisor
Principal

Professional Organizations:

Association for Supervisors and Curriculum Development
National Society for the Study of Education
American Education Research Association

Specialist in Following Areas:

Curriculum Theory and Development
Social Studies Education, Urban Education, Administration and Supervision, Management and Organizational Theory, Philanthropic Foundations. Educational Politics.

Director of Research, Planning, and Evaluation - Trenton Public Schools. Established new division under the Superintendent of Schools to provide technical assistance in these three vital areas. From September 1, 1970.

Project Director: Building a comprehensive planning system using an Educational Program Planning Budgeting System (EPPBS). Project funded under Title III, ESEA at $184,000 over three years.

Program Development Specialist - New Jersey Urban Schools Development Council. Develop and implement innovative programs and provide technical assistance in the areas of program development and evaluation (December - August 1970). NJUSDC is a consortium of New Jersey's ten most urban school districts with headquarters in Trenton, N.J. Special areas of involvement while at NJUSDC: Aerospace, Science-Mathematics, Language Arts, Environmental Education, Title III Evaluation, Curriculum innovation, drug education, and Urban Studies.

Designer and editor of the Curriculetter, the Council's teacher oriented newsletter. Full-time Graduate Study--completion of doctoral dissertation June - December 1969.

Teacher - Social Studies and Language Arts - Herbert Hoover Junior High School, Edison, New Jersey, Mr. Harry Olsen, Principal, September 1967 - June 1969.

Additional Assignments: Member - Steering Committee, Social Studies Curriculum Revision, Edison Township; Chairman, Cultural Geography Revision Committee, Edison Township; Chairman, Administration Committee, New Jersey State Self-Study Evaluation, Herbert Hoover Junior High School; Member, Committee on Proposed Program for Unsuccessful Students, Herbert Hoover Junior High School.

Co-operating Teacher - Monmouth College, Office of Teacher Education, 1968-69.

Summer 1968. Social Studies revision. Wrote Cultural Geography Grade Seven, course of study for the Edison Township public schools.

Military Service - August 1965 - August 1967.

Teacher - Social Studies and Language Arts - John Adams Junior High School, Edison, New Jersey, Dr. Joseph A. Kreskey, Principal. September 1964 - June 1965.

Sales - salary and commission - fine jewelry - E. J. Korvette, Inc. North Brunswick, New Jersey, Mr. Eugene Glazer, Store Manager. April 1959 - September 1964. Worked at this position all during my years in college and graduate school - part time.

Apprenticeship - Plumbing and Heating Trade - summers of 1960 and 1961. Worked through the offices of Local 432, Plumbers and Steamfitters Union, AFL-CIO, on local construction work.

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Professional Writings

David E. Weischadle. Philosophy of History as found in Selected Secondary School American History Textbooks. Unpublished Master Thesis, Rutgers University, New Brunswick, New Jersey, 1964.

_____. "American History in Our Secondary School Textbooks: A Philosophical Approach," The Social Studies, LVIII (February 1967), 62-68.

_____. "The Supervisor As A Leader," Education, 88 (February - March 1968), 254-257.

_____. "Chautauqua: An American Experience in Adult Education," Peabody Journal of Education, XLVI (July 1968), 24-28.

_____. et al. Cultural Geography: A Course of Study. Edison, New Jersey: Edison Public Schools, 1968.

_____. "1917: The Third Revolution," International Review of History and Political Science, V (August 1968), 128-144.

_____. "A Stop at Penang on the Run from Singapore to India." The New York Times, Novenber 24, 1968, 33.

_____. "Chautauqua: An American Experience in Adult Education," The Education Digest, XXXIV (January 1969), 47-49.

_____. "History Lives in Monuments to Washington," This Weeks Magazine in The Sunday Times Advertiser (Trenton, N.J.), February 22, 1970 18.

_____. The Carnegie Corporation of New York: A Study in Educational Politics. Unpublished doctoral dissertation, Rutgers University, June 1970.

_____ and Mary Ann Piscopo. "Summertime the Time to Visit Puerto Rico," This Week Magazine in The Sunday Times Advertiser (Trenton, N.J.), July 6, 1970, 19.

_____. "Paternalism: A View of the Latin American Foreign Policy of the United States, 1823-1934," The Social Studies, LXI (November 1970), 263-269.

_____. "A Change in Direction (Curriculum Development)," Illinois Schools Journal, L (Fall 1970), 220-228.

Military Service in the U. S. Army, August 1965 through August 1967

Entered as a second lieutenant and assigned to the U. S. Army Southeastern Signal School, Fort Gordon, Georgia. Instructed Combat Logistics and Military Justice to student officers and officer candidates. Assisted in developing curriculum and writing lesson for the officer candidate school. Awarded School's Certificate of Achievement and promoted to first lieutenant.

Assigned to the 228 Signal Company, Republic of Vietnam, Site Commander, in September 1966. Served as platoon leader and executive officer of the company. Promoted to captain and was serving as acting company commander at end of tour.

Honorable Discharge - May 31, 1969.

Honors and other accomplishments:

Dean's list - Rutgers University

Financial grant from the Engelhard Foundation to study Labor-Management Relations at the Institute of Management and Labor, Rutgers University.

Elected to Kappa Delta Pi, an honor society in Education

Member of Student Advisory Committee to Dean.

Speaker--A Seminar for Project Development, New Jersey State Department of Education, March 24, 1970

Speaker--Seminar for Title III Continuation Application, New Jersey State Department of Education, April 23, 1970.

Panelist--Program Development, Drug Education Seminar, Rutgers University, July 22, 1970.

SYSTEMS DEVELOPMENT MANAGER

EDMOND H. WEISS

Mr. Weiss is an education research specialist on the staff of Government Studies & Systems, Inc.

Education

B.A. in Literature, University of Pennsylvania, 1964
M.A. in Communications, University of Pennsylvania, 1965
Ph.D. (in progress) in Speech-Communications, Temple University, 1972 (est.)

Positions

Current

Education research specialist, concentrating on school system management and planning, and reading-linguistics research.

Prior

Supervisor of Research, Development, and Evaluation, South Jersey Educational Improvement Center, Pitman, New Jersey.

Communications Research Specialist, Systems Science Division, Franklin Institute Research Laboratories, Philadelphia, Pennsylvania.

Television-Film Producer, Community Programs Department, WCAU-TV (CBS owned outlet in Philadelphia).

Lecturer in Communications: Villanova University, Drexel Institute of Technology, Glassboro College.

Professional Emphasis

Designed and/or conducted evaluation studies of ESEA Title I programs in Philadelphia, Camden, and Atlantic City.

Directed the Development of an Information-Dissemination System for ESEA Title III programs in Pennsylvania.

Assisted in the design of a program budgeting strategy for Adult Basic Education in New Jersey.

Developed and managed evaluation studies of Adult Basic and WIN Learning Centers programs in New Jersey.

Designed and conducted evaluation of EPDA programs in Special Education for New Jersey Department of Education.

Designed and conducted Teacher education programs in curriculum evaluation.

Designed and conducted training programs for Evaluation Administrators in Management, PPB, PERT, and Accountability.

Managed the implementation of an Instructional Materials Center for eight counties in New Jersey.

Participated in the Research Coordinating Council and Evaluation Coordinating Council of the New Jersey Department of Education.

Assisted in the writing and implementation of ten ESEA Title III projects in New Jersey.

Designed and conducted seminars for the New Jersey Department of Education in proposal writing and performance objectives.

Provided instructional design consultation to the RCA-Camden project.

Designed numerous research projects and survey instruments for educators in South Jersey School Systems.

Participated in the development of the Differential Staffing Project for New Jersey Department of Education.

Served as evaluation team member for several New Jersey on-site program reviews.

Produced and authored six documentary films on urban topics (including educational urban planning) for WCAU-TV.

Produced or assisted in production of three television series on religion, education, and news issues.

Principal Publications

"The Dissemination of Innovative Educational Programs", Franklin Institute Technical Report.

"ESEA Title I in Philadelphia: The Third Year", Franklin Institute Technical Report (contributing author).

"Educational Program Evaluation" -- A concept paper of The Educational Improvement Center (EIC).

"Cost-Benefit Evaluation" -- An EIC concept paper.

"PPBS" -- An EIC concept paper.

"Performance Contracting" -- An EIC concept paper.

"Towards Teacher Accountability" -- An EIC concept paper.

"Introduction to Educational Program Evaluation" -- An EIC Administrator's Training Kit.

"Introduction to PPBS" -- An EIC Administrator's Training Kit.

"PERT, GANTT, and the Good Use of Time" -- An EIC Administrator's Kit (contributing author).

"A Glossary of Evaluation Terms" -- Report prepared for the New Jersey Board of Education.

"The Franklin Institute Mode for Dissemination", Pace Report, April, 1969.

"A Preliminary Study of the 'Philadelphia Accent'", Pennsylvania Speech Annual, September, 1969 (contributing author).

Papers Presented to Professional Meetings

"Current Models for Educational Evaluation", Pennsylvania Department of Public Instruction Workshop on the Evaluation of Innovative Programs, Philadelphia, October, 1968.

"A Systematic Model for Educational Dissemination", Middle-Atlantic Conference on Dissemination, Washington, January, 1969.

"Evaluation: Quality Control for Curriculum Specialists", New Jersey Association for Supervision and Curriculum Development, Asbury Park, April, 1970.

"PPBS -- A Primer", New Jersey School Boards Association Annual Conference, Atlantic City, October, 1970.

Memberships

Phi Beta Kappa
RESA (Scientific Research Society of America)

TECHNICAL TASK FORCE

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BOARD OF EDUCATION
ADMINISTRATION BUILDING
TRENTON, N. J.

DIVISION OF RESEARCH, PLANNING, AND EVALUATION

TECHNICAL TASK FORCE (TTF)

(Interim)

The Technical Task Force (TTF) has been formed to assist in the development of a comprehensive planning system for the Trenton Public Schools. It is particularly unique in that its composition includes local technical and professional people as well as outside consultant assistance.

All of the individuals, agencies, and organizations invited have either a direct or indirect relationship to the educational programs currently in operation in the school district. Their participation, hence, is on the basis of interest and concern for the future development of the Trenton schools.

The role of the Technical Task Force is to provide the school system with a forum for idea analysis. Some of these item will originate with the TTF; others will be brought to it by the Project Director. In any case, the TTF will have the opportunity to express its feelings and recommendations concerning these ideas. The TTF will also have an important role in forming many of the committees and work groups which will be needed as the project progresses and expands.

The present composition of the Technical Task Force will remain in effect until June 30, 1971, the end of the first project year.

November 30, 1970

TECHNICAL TASK FORCE (TTF)

Agenda for
Organizational Meeting

November 30, 1970

1. Introduction of TTF members
2. Overview of Trenton Public Schools and need for planning system
3. Review activities of new planning office
4. Role of Technical Task Force
5. Next meeting and topics for discussion

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EGB-3-6-70-FD.

BOARD OF EDUCATION
ADMINISTRATION BUILDING
TRENTON, N. J.

TECHNICAL TASK FORCE (TTF)

Agenda for Meeting January 12, 1971

1. Introduction of members

2. Review of last meeting

3. Review of recent activities

4. Overview of community involvement for current year and 1971-72

5. Next meeting

TECHNICAL TASK FORCE

Review of Meeting
January 12, 1971

1. Introduction of TTF Members
Present:

-Administrative and Supervisory Association (Mr. James Smith)
-Research for Better Schools (Drs. Connie Cummings & Jerry Dunn)
-Department of Community Affairs (Mr. John Cooney & Jacqueline Phares)
-Local Staff (Mr. David Tankel, Mr. Pasquale Maffei, & Dr. David E. Weischadle)
-GSS (Mr. Edmund Weiss)
-Trenton Education Association (Mrs. Pauline Colangelo)
-United Progress Incorporated (Mr. Thomas Cooper)

2. Reviewed last meeting and emphasized that the true thrust of PPBS must be for improvement of programs for students in Trenton Public Schools.

3. a. Discussed involvement in assisting Needs Assessment for Title VIII.

b. Discussed survey of community--lay participation in current school programs.

c. Reviewed the Master Orientation Schedule for Trenton Public School staff members.

d. Explained budgetary factors.

4. Presentment was made of a conceptual design to develop community involvement in the Title III project.

a. Specific needs of an EPPBS were developed and explained. Presentment of a two-phase program was made aimed at getting the specific needs.

Phase I--a survey of the adult population of Trenton to assess Trenton Public Schools.

Phase II--establishment of issue analysis groups aimed at refining EPPBS indicators and development of alternate solutions to improving conditions.

5. The conceptual design must be refined into a workable program. In order to refine the program and develop an instrument, Dr. Weischadle is now forming a committee to present an almost finished program for our February meeting.

6. Next meeting will be Monday, February 8, 1971 at 10:00 a.m. in the Education Annex, 434 East State Street.

TECHNICAL TASK FORCE (TTF)

Agenda for
Organizational Meeting

February 8, 1971

1. Review of last meeting
2. Review and discussion of community survey activities
3. New Business
4. Next meeting and topics for discussion

TECHNICAL TASK FORCE

Review of Meeting
February 8, 1971

Introduction of TTF members
Present:

-Trenton Federation of Teachers (Mr. Robert Grahan)
-Administrative and Supervisory Association (Mr. James Smith)
-Research for Better Schools (Drs. Connie Cummings & Jerry Dunn)
-Department of Community Affairs (Mr. John Cooney, Mrs. Ann L. Erdman, and Jacqueline Phares)
-Local Staff (Mr. David Tankel, Dr. David E. Weischadle)
-GSS (Mr. Edmund Weiss)
-New Jersey Urban Schools Development Council (Mr. Donald Clark)

The entire meeting involved an item by item investigation of the community survey instrument developed by Mr. Cooney, Mr. Cooper, and Mr. Weiss. Several revisions were made and will be reflected in the final instrument.

It was agreed that the revised instrument should be reviewed at the next Technical Task Force meeting.

During the interim, Dr. Weischadle met with Mr. Jacob Getson, Director of Model Cities to discuss future Model Cities involvement. It was decided that the Division of Planning of Model Cities would be a more appropriate channel of communication. Contact was made with Mr. John Pietras, Director.

NEXT MEETING--MARCH 2, 1971 AT 9:00 a.m. IN THE EDUCATION ANNEX

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TRENTON PUBLIC SCHOOLS
NINE SOUTH STOCKTON STREET
TRENTON, NEW JERSEY 08611

DR. DAVID E. WEISCHADLE
Director of Research and Evaluation

March 2, 1971

Agenda for Technical Task Force Meeting

1. Review of Activities
2. Discussion of
    a. State Evaluation
    b. Community Opinionaire
    c. STEP - System for Trenton's Educational Planning
3. Future topics - Discussion
    a. Evaluation Plan for Project
    b. Dissemination Plan
4. Other Subjects

TECHNICAL TASK FORCE

Review of Meetings
March 2 and 5, 1971

1. March 2
   Members Present:

   -Administrative and Supervisory Association (Mr. James Smith)
   -Department of Community Affairs (Jacqueline Phares)
   -Local Staff (Mr. David Tankel & Dr. David E. Weischadle)
   -GSS (Mr. Edmond Weiss)
   -United Progress Incorporated (Mr. Thomas Cooper)
   -Model Cities (Mr. John Pietras)
   -NJUSDC (Don Clark)

   March 5
   Members Present:

   -Research for Better Schools (Dr. Connie Cummings)
   -Trenton Education Association (Mrs. Pauline Colangelo)
   -Model Cities (Mr. John Pietras)
   -Trenton Federation of Teachers (Mr. Robert Graham)

2. Reviewed format of the Trenton Community Opinionnaire

   A. Altered structure of questions 1 and 2 from selection of five best and five worst items. Reviewed remainder of questions to determine continued relevancy importance.

3. The map included on the questionnaire was reviewed. Some confusion seems to be present, which Dr. Weischadle will clerify prior to publication.

4. Discussion of STEP-- System for Trenton's Educational Planning was postponed until next meeting. This subject plus the evaluation and dissemination plans for the project will be discussed. GSS will mail STEP to each member. Dr. Weischadle will mail copies of the evaluation plan and dissemination plan in a separate plan.

5.

   A. The Trenton newspapers have indicated a willingness to publish the opinionnaire gratis.

   B. Dr. Weischadle consulted with Opinion Research Corporation concerning the opinionnaire's format, structure, and wording. Changes will appear as a result of this.

   C. On March 9, 1971, the Board of Education was informed of the opinionnaire and its purposes. No objections were raised.

   D. Tentative date of publication in newspaper will be Sunday, March 28 in the Trenton Times and Monday, March 29 in the Trentonian.

6. Next meeting--April 2, 1971, Friday, at the Education Annex, 10:00 a.m.

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TRENTON PUBLIC SCHOOLS
NINE SOUTH STOCKTON STREET
TRENTON, NEW JERSEY 08611

DR. DAVID E. WEISCHADLE
Director of Research and Evaluation

April 2, 1971

Agenda for Technical Task Force Meeting

1. Review of Trenton Community Opinionnaire
2. Discussion of STEP
3. Discussion of Evaluation Plan
4. Discussion of Dessemination Plan
5. Next Meeting--Topics

TECHNICAL TASK FORCE
EPPBS - TITLE III

Invited Participants

Mr. Robert W. Ward
Director of Program Development
Division of Research, Planning, and Evaluation
New Jersey Department of Education
225 West State Street
Trenton, New Jersey

Mr. Raymond Milam
Executive Director
New Jersey Urban Schools Development Council
1000 Spruce Street
Trenton, New Jersey

Mr. John Cooney, Director
Division of Youth
New Jersey Department of Community Affairs
363 West State Street
Trenton, New Jersey

Dr. Connie Cummins, Project Manager
Research for Better Schools
1700 Market Street
Suite 1700
Philadelphia, Pennsylvania

Mr. Jacob Getson, Director
City Demonstration Agency
City Hall Annex
Trenton, New Jersey

Mr. Albert Robinson, Director
United Progress, Inc.
401 Pennington Avenue
Trenton, New Jersey

Mr. Eladio Perez
Council of Puerto Rican Organization
114 North Montgomer Street
Trenton, New Jersey

Mrs. Pauline Colangelo, President
Trenton Education Association
Trenton Central High School
Chambers Street
Trenton, New Jersey

Mr. Robert Graham
Trenton Federation of Teachers
Trenton Central High School
Chambers Street
Trenton, New Jersey

Mr. James Smith
Supervisors and Administrators Association
Junior High School No. 5
North Montgomery Street
Trenton, New Jersey

Dr. Ercell I. Watson
Superintendent
Trenton Public Schools
9 South Stockton Street
Trenton, New Jersey

Mr. Pasquale Maffei
Assistant Superintendent
Trenton Public Schools
9 South Stockton Street
Trenton, New Jersey

Mr. William Walker
Assistant to Superintendent
Trenton Public Schools
9 South Stockton Street
Trenton, New Jersey

Dr. David E. Weischadle, Director
Research, Planning, and Evaluation
Trenton Public Schools
9 South Stockton Street
Trenton, New Jersey

Mr. Thomas Mitchell
Secretary - Business Administration, Board of Education
Trenton Public Schools
9 South Stockton Street
Trenton, New Jersey

Mr. John Deacon ...
Assistant Secretary - Business Administration
Trenton Public Schools
9 South Stockton Street
Trenton, New Jersey

Mr. David Tankel
Director, Title I
Trenton Public Schools
434 East State Street
Trenton, New Jersey

Mr. Larry Workman
Intern for Assistant Superintendent CI
Trenton Public Schools
9 South Stockton Street
Trenton, New Jersey

COORDINATING COUNCIL

BOARD OF EDUCATION
ADMINISTRATION BUILDING
TRENTON, N. J.

DIVISION OF RESEARCH, PLANNING, AND EVALUATION

COORDINATING COUNCIL

In order to facilitate a smooth development of a comprehensive planning system into the Trenton Public Schools, a coordinating council has been organized by the project director. Its main function is to advise the planning director in regard to readiness of the local district to adopt this system. The members, at the same time, have the task to assist the director in his plans and operations, providing him with a team of assistants spareheading activities in their respective areas of responsibilities.

Included on the Council are the:

1. Superintendent of Schools
2. Assistant Superintendent for C & I
3. Secretary of the Board/Business Manager
4. Assistant Secretary/Business Manager
5. Director of Title I
6. Consultant from Government Studies and Systems
7. Director of Research, Planning, & Evaluation

EVALUATION PLAN

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The Evaluation Process

An effective evaluation process is a prime essential to a successful educational project. Such a process provides indicators so as to determine change in behavior and level of impact. Ideally, the evaluation process is defined in the planning stages of a project through the establishment of performance objectives, description of worthwhile activities, and evaluation procedures to measure the level of achievement.

The project director, charged with the task of designing an evaluation program ex post facto of the planning, selected the six tasks outlined in the proposal upon which to build the process. The objectives of the project are somewhat similar to the tasks, but are cumbersome and poorly stated. The statement of the tasks are simple and "performance" oriented.

Task six (6.0) pertains to the general administration and supervision of the project by the project director. This task then serves well as the unifying thread upon which to describe an evaluation process designed to measure total program effectiveness.

The evaluation process is one made up of a series of continuous procedures, providing indicators at various stages of program effectiveness. Key procedures in the total process involve the following:

1. Reassessment of objectives. In terms of activities, past and ongoing, the objectives of the program are reassessed frequently to insure their relevancy and significance.
2. Internal assessment. The project director, with the assistance of the Coordinating Council and Technical Task Force, assesses activities in terms of designed evaluation measures or instruments.
3. Statistic collection. Pertinent data concerning the project's impact on the administrative and teaching staff are collected

and analyzed. Similarly, other data, e.g., members of agencies, organizations, and institutions in communication links, are also collected.

4. Divisions log. The office maintains a daily log (comprised of date, event, and comment, and initial categories) to record daily activities, thus keeping a specific indication of how time was spent, on what activities, and frequency of certain activities.
5. Instrument design. In order to evaluate specific activities or objectives, specially tailored instruments are developed to acquire certain data or information, e.g. questionnaire following orientation sessions. Such instruments become important tools in designing future programs.
6. Project Management. Through various management techniques, the project director maintains control of general development, task completion, consultant activities, expenditures, and staff development. Useful here are such tools as PERT and GANNT charts and system's analysis.
7. State overseer. Through the state expeditor and annual evaluation team, the project director gains useful outside perspective of project development and effectiveness. Such an assistance provides the project director with an almost total overview of his operations.

Evaluation Procedures

Based on these general areas of evaluation, the project director has designed specific evaluation procedures for each of the tasks. They are:

EPPBS - PLANNING MATRIX

OBJECTIVES	ACTIVITIES	EVALUATION
1.0 Design and implement procedures for involving citizens in the education planning process.	1.1 In two phases, citizens will be brought into actually planning sessions, utilizing an EPPBS system of strategic planning 1.1.1 Phase I (February - May) A. Survey adult population of Trenton through questionnaires developed by team composed of professioanls from community agencies, state agencies, and local staff. B. Analyze to determine priority indicators needed for EPPB systems planning. 1.1.2 Phase II (September 1971) A. Form "issue analysis" type groups to focus on priority indicators and refine their context. B. Develop alternative programs aim at meeting achievement gaps designated by these priority indicators.	1.1 Instrument will be pre-tested on random selected adults. 1.2 The pre-test results will be in terms of applicability to actual use 1.3 Review results of test by Coordinating Council and Technical Task Force 1.4 Write analytical report based on data and have it reviewed and evaluated by two groups

Trent Public Schools
Dr. David E. Weischadle

EPPBS - PLANNING MATRIX

OBJECTIVES	ACTIVITIES	EVALUATION
2.0 Implement a program to organize activities of educational and community agencies for involvement on the education planning process.	2.1 Organize a Technical Task Force (TTF) to assist project in the design of a comprehensive 2.2 Hold monthly meetings to discuss progress of project and specific efforts being conducted	2.1 Interview members of the Technical Task force to determine a. relevance of activities b. improved knowledge of planning procedures c. conduct of project

Trent Public Schools
Dr. David E. Weischadle

EPPBS - PLANNING MATRIX

OBJECTIVES	ACTIVITIES	EVALUATION
3.0 Orient the Board of Education all levels of administration, and the general teaching staff in the principles of EPPB System.	3.1 Design orientation sessions for: a. Board of Education b. Central Office Staff c. Elementary & Secondary principals d. General Teaching Staff 3.2 Conduct orientation for the above	3.1 Members reached a. Administration b. Teachers c. Board 3.2 Evaluation instrument will be sent to all those who attended to ascertain the appropriateness of the orientation sessions.

Trent Public Schools
Dr. David E. Weischadle

EPPBS - PLANNING MATRIX

OBJECTIVES	ACTIVITIES	EVALUATION
4.0 Modify EPPBS system (responsibilities of system development manager, GSS)	4.1 Make minor modifications in the Pupil Population Forecaster 4.2 Modify Revenue Forecaster 4.3 Develop Planning Information System 4.4 Modify Cost, Manpower and Indicator Forecaster 4.5 Identify and specify goals, objectives, indicators and constraints--School District wide 4.6 Develop Monitoring and Evaluation Procedures 4.7 Develop project Design and Cost Benefit Analysis Procedures 4.8 Modify EPPBS Pricedures--forms, directions and work schedules	4.1 Director's review as to applicability to system Review by Steering Committee (Coordinating) 4.2 Review by Coordinating Council and Technical Task Force, using 1. applicability 2. relevancy 3. accuracy, and 4. usefulness as standards of criteria 4.3 Review by Superintendent and Board of Education

EPPBS - PLANNING MATRIX

OBJECTIVES	ACTIVITIES	EVALUATION
5.0 Supervise the development of system's work and provide technical assistance to project director (responsibilities of system development manager, GSS)	5.1 Assist the Project Director in the process of development, review, modification and approval of the Phase I detailed work program, including development of detailed work programs for the systems work and orientation activities 5.2 Provide information to be Project Director for dissemination, such as, quarterly and annual progress reports 5.3 Provide information the Porject Director for the annual evaluation 5.4 Assist the Project Director in developing Continuation Grant Requests, including detailed work program for Phase II and summary work program for Phase III 5.5 Assist the Project Director in preparing for and supervising the activities under Tasks 1.0, 2.0, and 3.0 5.6 Continuous administration and supervision of systems work under Task 4.0	5.1 Maintain an instrument to evaluate in-coming progress reports. Elements to be included are: A. Accuracy B. On-time C. Completeness D. Substantive activities 5.2 Availability to project and time spent 5.3 Local staff and TTF evaluation of GSS

Trent Public Schools
Dr. David E. Weischadle

EPPBS - PLANNING MATRIX

OBJECTIVES	ACTIVITIES	EVALUATION
6.0 Administrate & Supervise the general operation of the EPPBS project.	6.1 Develop the detailed work program for Phase I--this process includes review, modification and approval by appropriate authorities	6.1 Maintenance of log book containing relevant activities
	6.2 Hire personnel and set up office	6.2 Regular meeting with 1. TTF 2. Steering Committee 3. Superintendent
	6.3 Supervise Tasks 1.0, 2.0, and 3.0	
	6.4 Assist the Systems Development Manager in the systems work in Task 4.0	6.3 Development of a coordinating committee
	6.5 Prepare and implement the dissemination plan	6.4 Design evaluation instruments for each phase of project to insure a. collection of data b. adequate management c. careful planning
	6.6 Evaluate the efforts of Phase I	6.5 Periodic budget report from business as to expenditures
	6.7 Develop Continuation Grant Request	
	6.8 Continuous supervision and administration of the overall Project effort	

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Month _____
Year _____

DIVISION OF RESEARCH, PLANNING, AND EVALUATION

DATE	EVENT, ACTIVITY, ETC.	COMMENTS	INITIALS

REPORTS AND WORKING PAPERS

GOVERNMENT STUDIES AND SYSTEMS

Report on

Preliminary Organization Meeting

October 19, 1970

Government Studies & Systems, Inc.

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1. On October 16, 1970, a preliminary organizational meeting for the Trenton EPPBS Project was held in the office of Dr. Weischadle. In attendance were:

Trenton Public Schools

Pat Maffei
David Weischadle
John Deacon
Larry Workman

GSS

Ed Brewin
Ed Weiss

The agenda of that meeting is attached.

2. Mr. Maffei, in his opening remarks expressed the belief that the development of the Trenton PPB system should have - above all else - a measurable impact on student performance and instructional effectiveness. All in attendance were in accord.

3. GSS received its copy of the contract between the Trenton School District and GSS.

4. It was agreed that all meeting agendas for the project should be developed collaboratively.

5. It was agreed that distribution of all reports and other documents related to the project should follow a carefully determined distribution list, to ensure that all persons are kept informed on matters that they should know about.

6. It was agreed that the project should include an effective internal evaluation.

7. The possibility of advancing the approved project schedule through the application of additional resources was expressed by Mr. Maffei; it was agreed that any advancing of schedule with a concomitant change in funding would require re-negotiation of the contract. GSS is willing to entertain such a proposal if the occasion arises.

8. It was agreed that a procedure for identifying the persons to be invited to any project meeting should be explicit and logical, to avoid internal communication problems in the project.

9. The project director will shortly develop a project Newsletter

10. Mr. Maffei expressed the hope that full scale sub-projects (e.g. a math improvement program) could begin at once, without the need to wait for completion of the planning system. All agreed that, given adequate communication, any such project could be implemented at any time.

11. Mr. Deacon explained his plans to develop an improved information system for day to day operational activities in the school district. The need was stressed, and agreed upon, that the development of the Planning Information System (one of the Title III tasks) should be articulated with Mr. Deacon's program.

12. Both Dr. Weischadle and Mr. Weiss agreed to keep journals of project activities, to ensure adequate project documentation.

13. In a preliminary discussion of the roles of other agencies, it was agreed that the Task Force identified in the proposal will be, in effect, a technical advisory group, because its membership is mainly persons and agencies with special interest in , and expertise with, urban and educational planning techniques and problems. The Task Force members (Task II) will mainly advise and comment on the procedures in the system itself and the approaches used in the project. They will also provide valuable insights into the generalizability of the system to other contexts.

By contrast, the citizen involvement outlined in Task I has a somewhat different purpose. Persons participating in this activity will be those with a direct relationship to the Trenton Schools themselves -- as parents, taxpayers, etc. -- and they will mainly be consulted for their beliefs about needs, problems, issues, and priorities for the Trenton Schools. To the degree possible, this activity will result in representative samplings of public opinion in Trenton. Procedures to be employed in Task I will be subject to consideration by the Task Force, and approval by the Administration. Similarly, membership in the Task Force itself will be subject to approval by the Administration.

Trenton EPPBS Project

Progress Report: November, 1970

Government Studies & Systems, Inc.

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1. Completed Activities

2. Activities in the Near Future

3. Comments

4. Attachments

   a. The Role of the Agency Task Force

   b. General Outline of An Educaticnal Strategic Planning System

Completed Activities

1. Details of the performance contract between GSS and the Trenton School District have been completed; included in these details was a separation of responsibilities between the two agencies, and conditions for payment.

2. An administrative steering committee has been formed and has held two meetings. The mission of this committee has been to clarify the activities in the project and develop schedules; additionally, the committee decides upon procedures for the ongoing administration of the project.

3. GSS, with the steering committee, has developed a revised work schedule for the six project tasks, to adjust for changes in the funding period.

4. GSS has begun to define alternative roles for the agency task force, and proposed some means for citizen involvement.

5. GSS has begun the development of presentation materials for the various orientations and presentations in TASK 3. These materials include transparencies and hand-outs.

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Activities in the Near Future

1. GSS will begin its series of orientations and presentations in December.

2. System design for the:
   - enrollment forecaster
   - revenue forecaster
   - planning-information system
   - cost-indicator forecaster
   - program structure
   - and other system elements

   will begin in December.

Comments

Some small delays in project start-up were caused by the busing crisis in Trenton. There is every reason to expect, however, that all projected activities for Year 1 will be completed on schedule.

ROLE OF THE AGENCY TASK FORCE

Task II of the Trenton-GSS contract is concerned with developing procedures for the participation of an Agency Task Force in the development of the Trenton Planning System. The following paragraphs are a first attempt at defining the role of the Agency group in the project.

It is proposed that the Agency Task Force be thought of -- and, hereafter referred to -- as the Technical Advisory Group. Its membership shall consist of representatives of United Progress, Urban Schools Development Council, Model Cities-Trenton, Research For Better Schools, and possible others. The primary mission of the Technical Advisory Group will be to consider alternative ideas for inclusion in the planning system and pass these recommendations along to the Superintendent and Administration. Final, binding approval of any system element resides in the Administration, and the input from the Technical Advisory Group will, presumably, be one of several sources consulted by the Superintendent and his Staff. Because the members of the Group have expertise in urban and educational planning techniques, the Group's judgments and recommendations will probably be quite helpful.

Generally, the Project Director and the System Development Manager (GSS) will prepare alternative proposals for consideration by the Technical Advisory Group. The Project Director will preside at the Group's meetings, and transmit the Group's judgments to the Administration.

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The Technical Advisory Group will be asked to provide recommendations on such topics as:

forms of citizen involvement

methods of organizing and presenting information

techniques for enhancing communication between the School District and interested agencies

General Outline of an Educational Strategic Planning System

Trenton EPPBS Project

Working Paper #1

November, 1970

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Goals of the System

Trenton's Educational-Planning-Programming-Budgeting System is a strategic planning system. The function of a strategic planning system is to assist the policy decision-makers of an agency to decide on multi-year objectives for the organization and allocate resources in a way most likely to achieve those objectives.

In a well designed strategic planning system, goals and objectives are stated publicly and explicitly, and in a measurable form. The decision group considers many alternative means for achieving the desired ends, and selects the "best" course of action, that is, the activities that will most likely achieve the desired ends in the most economical way.

What the System is Not

A planning-programming-budgeting system is not a management or operational control system. Strategic planning is concerned with the multi-year objectives and activities of the agency, and not the day-to-day operational management of the agency. A well-developed long-range plan will be helpful in making short-term management decisions, but it is wise not to confuse the two kinds of system.

What is a strategic plan?

In general a strategic plan contains the following elements:

- a status report on the organization
- an estimation of what the organization will be like in five years, if there are no policy changes made
- a statement of the desired status of the organization at the end of five years
- a set of planned activities that will close the gap between where the organization expects to be (with no policy changes) and where the organization desires to be.

Costs and Effects

PPBS, unlike other budgeting systems, relates costs to effects. A strategic planner does not merely spend money, he invests money in purchasing the desired outcomes of his agency. The strategic planner does not ask: How can I cut costs? He asks, rather: How can I achieve the organization's objectives in the most economical way?

The Concept of "Indicators"

The planning approach developed by Government Studies & Systems, Inc., relies heavily on the concept of Indicators of Effectiveness. The Trenton policy makers will determine what

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measures of quality or effectiveness they believe most appropriate to use in planning for their schools. These measures will take the form of Indicator Scales.

The most important measures are called Output Indicators, that is, scales which measure the overall effectiveness of the school system. Although the specific Indicators will be determined later, some possible candidates are:

- Drop-out Rate
- % college placement
- % occupational placement
- Reading-Language Competence
- Math-Science Competence
- Income of graduates
- Physical-Mental Health of Graduates

etc.

In addition to Output-Indicators, some Process Indicators may also be useful, such as:

- Average class size
- Expenditure/student
- Attendance rates
- Teacher Education

etc.

At any given time the school system can assess itself on those Indicators, predict what will happen if no policy changes are made, set desired levels for the Indicators, and choose the most economical way of closing the gap between anticipated and desired levels.

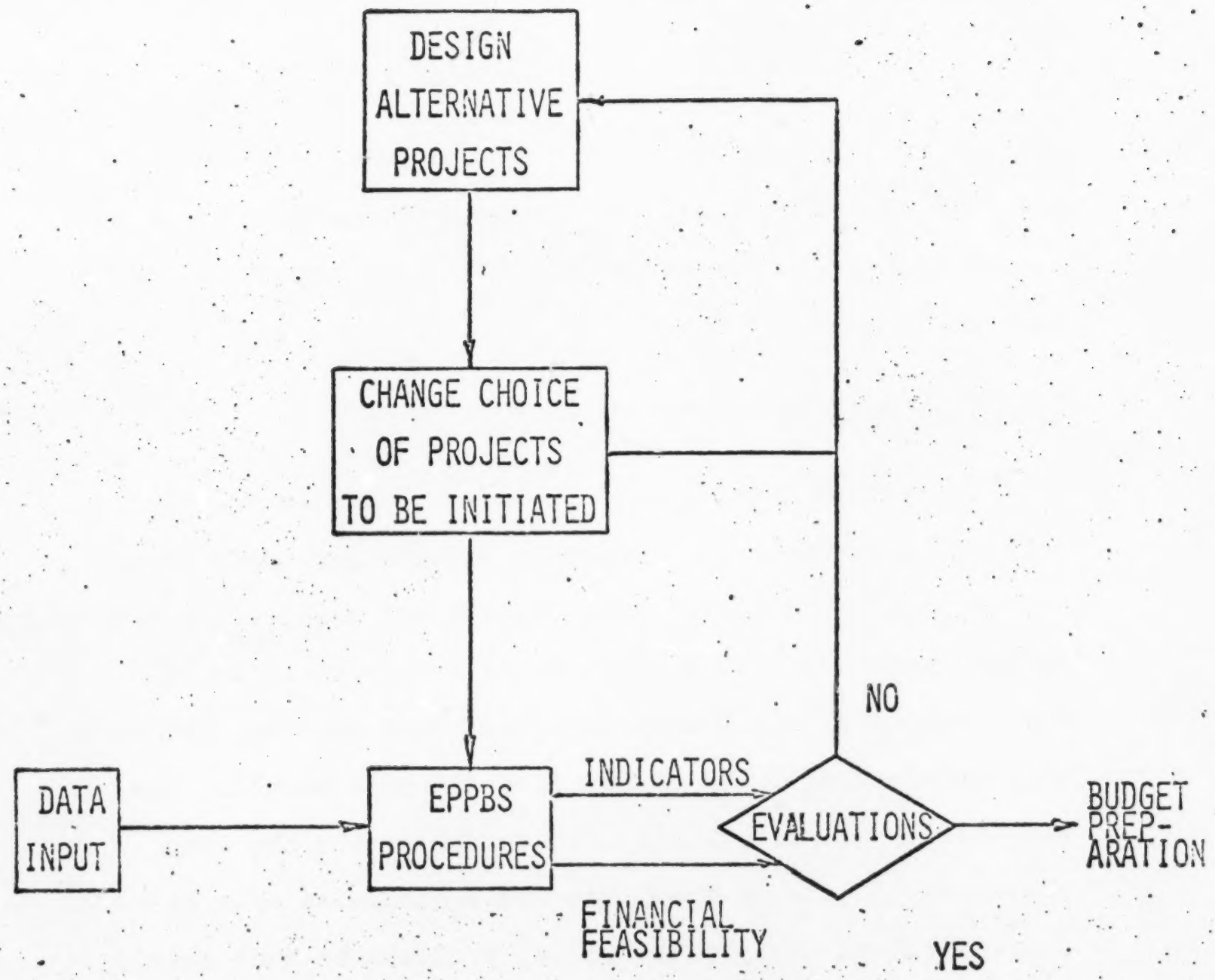
The Project Concept

In order to close an indicator gap, a project must be designed and implemented. Once the planners have specified the desired levels and gaps, and assigned priorities to the various gaps, they entertain alternative project designs for activities to close the gaps. Several different sets of projects are considered, and the automated component of the system calculates the additional costs and impact on indicators of the various sets.

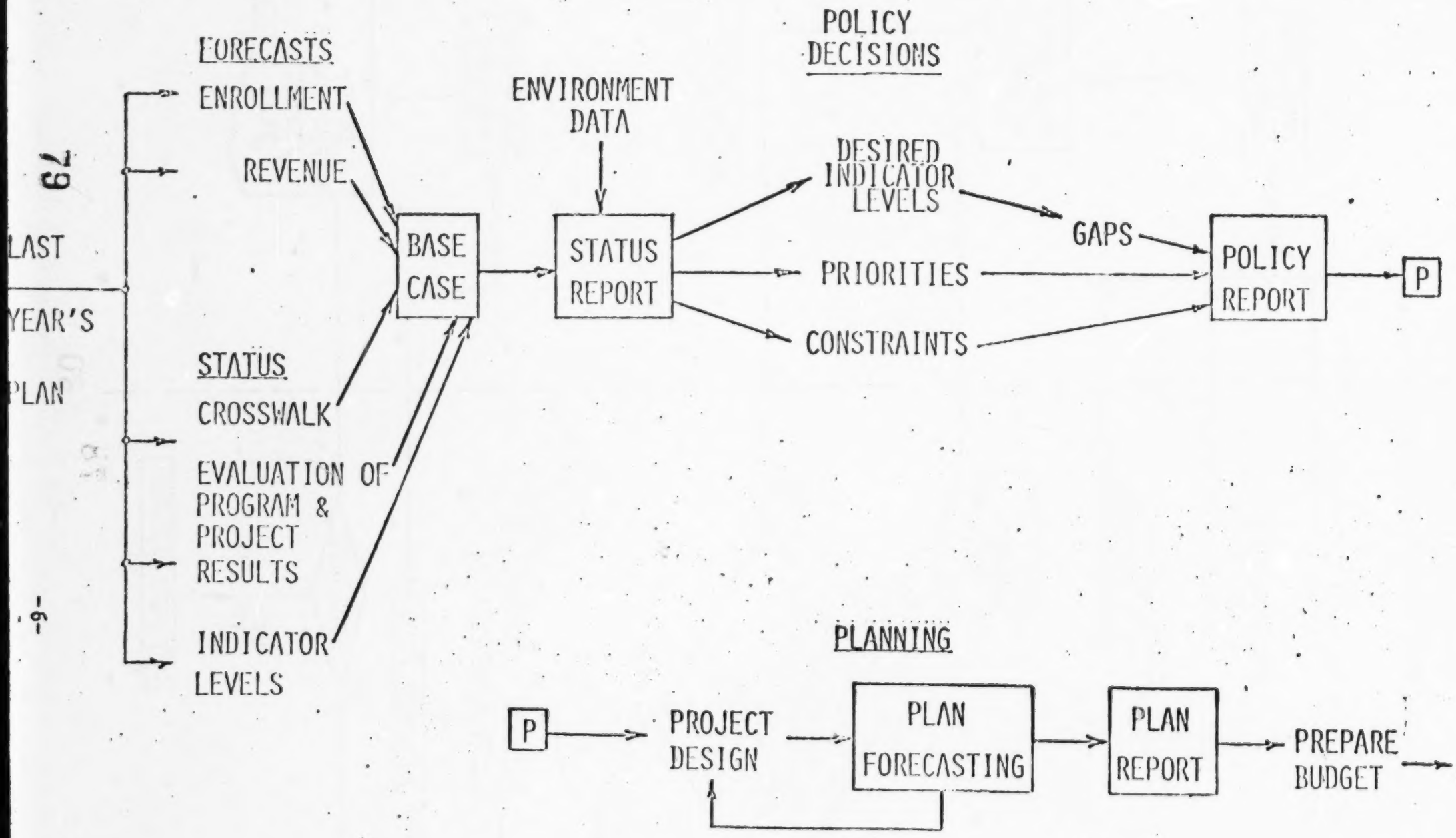
Selecting a Plan

The policy makers now have before them, in one place, a detailed analysis of the costs, effects and needs of the school system. They can see, clearly and easily, the comparison of alternative decisions they might make - in terms of costs and effects. Within any given cost ceiling, the data will help the decision-makers find the best budget. The computer's job, in all this, is to facilitate the many thousands of calculations that would otherwise make it impractical to analyze the policy problems in such detail; the computer, of course, makes no decisions, but gives the policy group the data it wants, in a readable, accessable form.

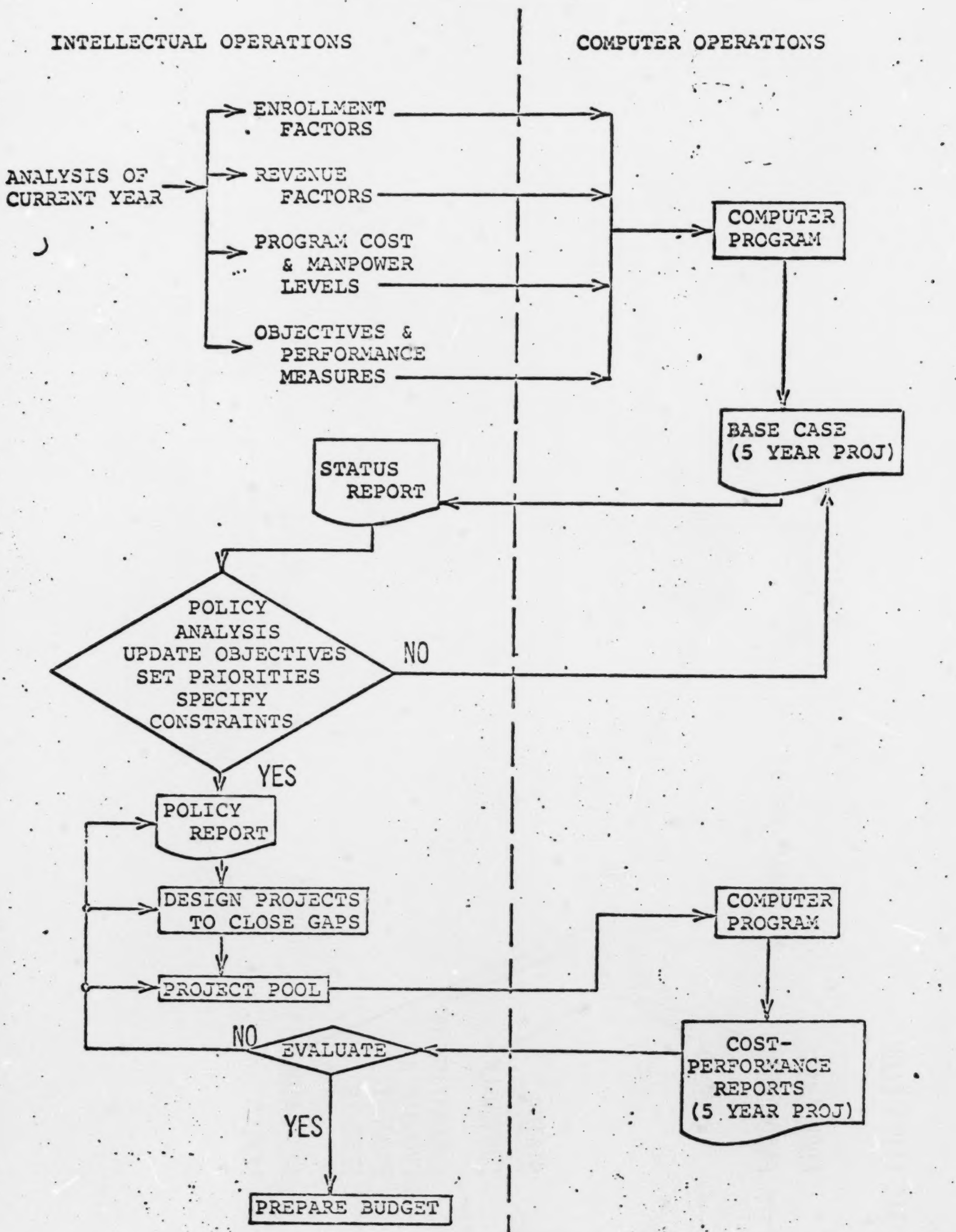
BASIC PROCESS



BASIC EPPBS FLOW



FUNCTIONAL FLOW OF EPPBS



What data will be available

1. An analysis of last-year's budget in a program-budget form
2. A five-year forecast of all costs, as a function of inflation
3. A five-year enrollment forecast for the school district
4. An adjusted forecast of costs based on increased (or decreased) enrollments
5. A profile of the school system on its own indicators of quality, as well as a forecast of what will happen to those indicators if no new projects are implemented
6. A five-year projection of the gaps between anticipated indicators and desired levels on those indicators
7. The costs and probable effects on indicators of various project alternatives - including the staff and facilities needs, as well as the new revenues that will be needed to support them

Designing the System

Over the next 2 years and 8 months, many details and procedures will be designed so that this general design will fit precisely the philosophy and problems of the Trenton School System. These activities may be summarized broadly under the following headings:

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Objectives

Rrocedures for selecting indicators, assessing the schools on those indicators, and setting desired levels and priorities. Important in this general cluster of activities is the selection of techniques for surveying the general community and special interest groups in Trenton so that reliable information about community preferences and aspirations can be fed into the policy group.

Professional Education

Orientation and training for all school system personnel in the use of the system, with intensive training for those persons who will operate if after the three-year federal funding period has ended.

Systems Design

Procedures, forms, techniques, and computer programs for:

- Pupil enrollment forecasing
- Revenue forecasting
- Cost forecasting
- Indicator forecasting
- Program Budget Analysis
- Monitoring and Evaluation Procedures
- Project Design and Evaluation
- Cost Effectiveness Analysis of Projects
- Information support systems
- User's manuals and schedules

Trenton EPPBS Project

Progress Report: December, 1970

Government STudies & Systems, Inc.

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2. Activities in the Near Future

3. Comments

4. Attachments

   a. Briefing, Orientation, Training Requirements

   b. Participation of the General Community in Trenton's Strategic Planning System: Some Possibilities

Completed Activities

1. The first meeting of the Technical Task Force (Task II Agency Group) was held; general goals and activities of the project were discussed, particularly the role of the Task Force in the development of the planning System.
2. Dr. Watson was briefed on the project progress to-date, and his own perceptions of how the project should proceed were discussed by members of the project steering committee.
3. A list of professional training requirements for "year 1" of the project was developed.
4. A set of transparancies to be used by Dr. Watson and Dr. Weischadle was developed and produced.
5. Analysis of the current year budget has begun, including revenues and expenditures.
- Analysis of enrollment data has begun.
- Development of alternative program structures has begun.
- A proposal for community participation has been written for consideration by the Technical Task Force and Administration. (See attachment)

tivities in the Near Future

Orientation and Training Activities will continue.

A package of "resource materials" will be developed for the Task Force.

- A working paper on program structures will be developed.
- A design for the community goals-survey will be developed.
- District test data will be examined as a basis for a planning pupil data base.
- A Preliminary enrollment forecasting model will be developed.
- Meetings will be held with Dr. Watson, the Steering Committee, the Technical Task Force, and others.

COMMENTS

Except for some delays in the training program and start-up of the Task Force, the project is on schedule. All activities in the system development task stream (Task IV) are on schedule and proceeding as planned.

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Trenton EPPBS

Briefing, Orientation, and Training Requirements

Year 1

	Date	Time
. Board of Education		
Briefing #1 (½ hr)	_____	_____
Briefing #2 (1 hr)	_____	_____
. District Administrators and Central Office Staff		
Briefing-Workshop (3-4 hrs)	_____	_____
. Secondary School Principals, Department Chairman		
Seminar (1½ hrs)	_____	_____
. Elementary Principals		
Seminar (1 hr)	_____	_____
. Teaching Staff Secondary		
Seminar (1 hr)	_____	_____
Teaching Staff Elementary		
Seminar (½ hr)	_____	_____

Trenton EPPBS Project

Progress Report: January 1971

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Past Months Activities

Task I & II

The main activities in these two tasks are related to the development of the community goals survey. The decision has been made to collect community perception data by "papering" the city with ballots - through distribution in newspaper ads, community agencies, schools, etc. In a meeting of the Technical Task Force (and a special sub-committee) a preliminary format has been developed. The ballot should be completed and in circulation by the end of February. The data from the accidental sample will be reported first without adjustments, and second with weighted adjustments from an ex post facto sampling design.

Task III

The main activity in January was orientation and briefing for the entire administrative staff of the Trenton Public Schools. These briefings were, in the main, well received, and subsequent meetings will be arranged for those administrators intrigued by this first round of presentations.

Task IV

Interviews were conducted with Mrs. Kuser and Mr. Teitel (City Planning Office) to review current enrollment forecasting practices employed in Trenton. Further meetings will be conducted to develop a detailed enrollment forecasting model and computer program.

TRENTON EPPBS PROJECT

PROGRESS REPORT

February 1971

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Past Month Activities

1. A major activity in the past month has been the development of the Trenton Community Opinionnaire by the Technical Task Force, and a special sub-committee of the task force. (Approval of the next-to-last version was secured at the March 2 meeting.

2. Another important activity in February was the drafting of the preliminary conceptual design report (Working Paper #3).

3. Data collection and analysis of enrollment and revenue data continued in February.

4. The project was "evaluated" by a two-man team from the State Department of Education; the meetings were apparently quite successful.

5. Work began on the enrollment and revenue forecasters; indicators; program structure; and other EPPBS procedures.

6. The technical development of the project is on schedule.

Coming Activities

1. Distribution, collection and analysis of the Trenton Community Opinionnaire.

2. Teacher orientation meetings

3. Continued development of software, forms, and procedures for EPPBS.

As per the work plan, February is the start-up month for a broad range of Task IV activities, including design of revenue analyzer, information system, indicator forecaster, etc.

Next Month's Activities

The main activities in the coming month are start of the community survey and start of several technical system design components.

Comments

While no serious problems hinder the project, certain observations can be made on the past months activities:

1. Model Cities has, so far, failed to participate in the project. It is hoped that some representative of M.C. will do so this month, because the success of the project's community involvement task requires support from Model Cities.
2. No representative of the State Department of Education has participated in the project. It is hoped that this situation will be remedied.
3. Many of the administrators who have participated in the meetings and briefings have expressed the need for Board support of the project, because of the serious political and financial problems that affect policy in the district. These same problems, however, have made it difficult to capture the interest of the

Board away from its ongoing program of major crisis resolutions. Support and paticipation by the Board will help to alleviate some of the skepticism expressed by the educational staff, several of whom believe that long-range, strategic planning is not feasible in Trenton.

STEP:

System for Trenton's Educational Planning

Preliminary Conceptual Design Report

Trenton EPPBS Project
Working Paper #3
February, 1971

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1.0 Basic Flow of the STEP Design

This system description is an extension and clarification of the description in Project Working Paper #1, General Outline, etc.

At the highest level of abstraction the flow of elements in STEP is as follows:

Stage 1 - Assessment of current educational costs and benefits, and, an updating of all those files necessary for operating the computerized elements in the planning system. The assessment is, thus, a collection of current facts, and also current ratios that will be used to generate forecasts of the future.

Stage 2 - The assessment data is fed into the "planning model," a set of computer programs which manipulate the data and produce forecasts.

Stage 3 - The generation of the base case; a five-year forecast of what the school district's costs and benefits will be, if the previous year's plan is approved without change for the present planning period.

Stage 4 - Policy deliberation; the desired levels of school district effectiveness are reviewed, to set new objectives, priorities, and constraints, or to approve those previously developed; this determination involves a community opinionnarie survey.

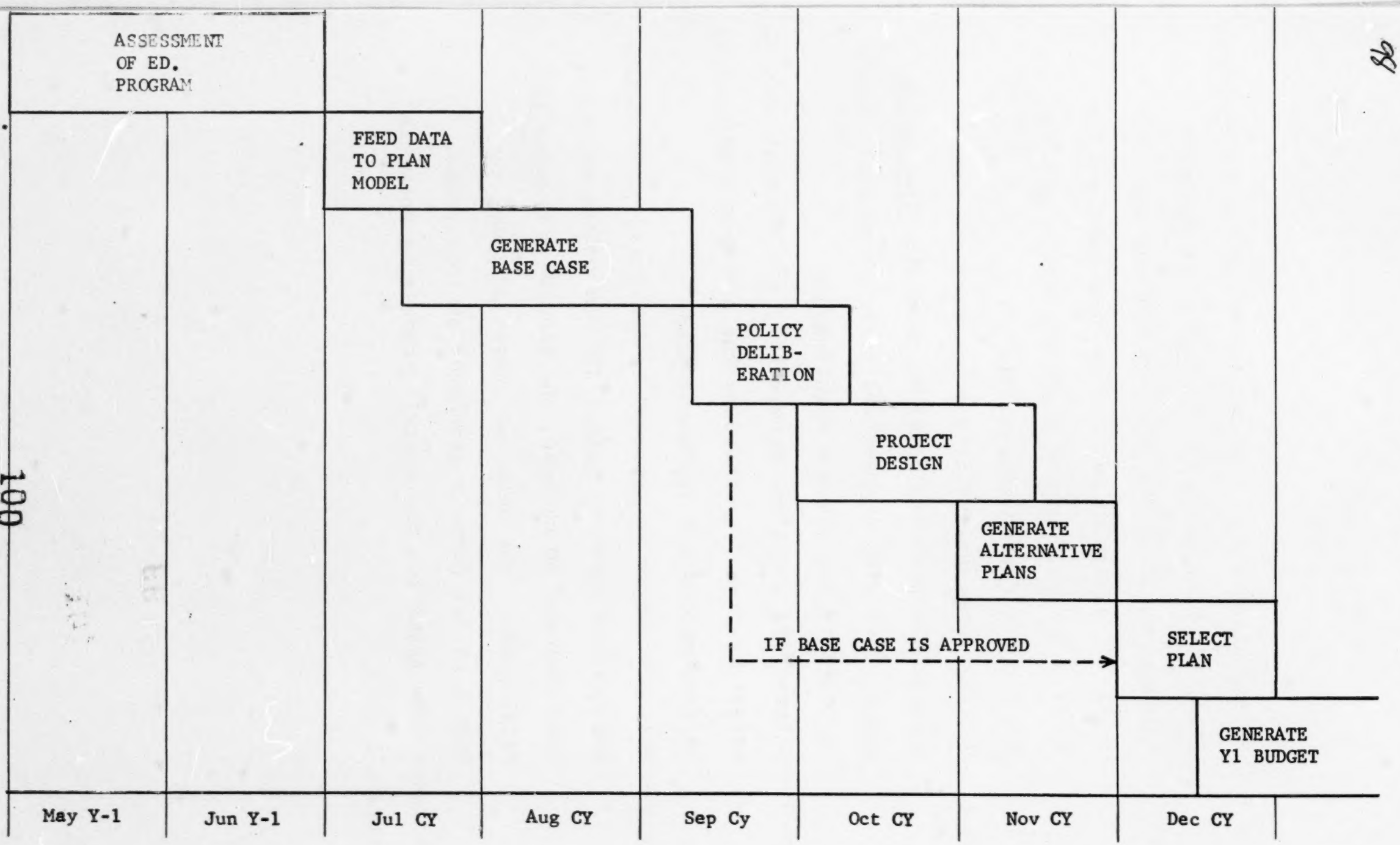
Stage 5 - If any changes are required by the policy deliberation, the next stage is the design of projects intended to close the gaps between the expected levels of effectiveness in the base case and the desired levels; community groups participate in the project design activities.

Stage 6 - Various combinations of new projects are run through the planning model to generate alternative plans, each with a specified anticipated cost, level of benefit, and revenue requirements.

Stage 7 - Alternative plans are considered, and the most cost - effective plan for achieving the district's objectives is recommended for implementation.

Stage 8 - That plan which is approved by the Board of Education becomes the approved plan. (If the policy deliberation required no changes, the base case becomes the final plan.) The detailed budget proposal for Year 1 of the plan is generated at this point.

A rough time frame for the overall process is shown in figure 1.



CY=Current Year of Plan

BASIC SEQUENCE OF STEP
(Figure 1)

2.0 Definitions of the Elements

These broad activities can only be understood by defining their components in more detail. The paragraphs that follow describe these elements at the conceptual level; operational definitions (and user procedures) will be described later in the project.

2.1 Annual Assessment

Strategic planning requires an assessment of the organization's overall behavior and effectiveness. The assessment reports facts which are important to the decision-makers and planners; in effect, the assessment is an up-dating of the planning information files, which are aggregrated at broad levels. Assessment at the strategic level cannot be expected to do the job of evaluating specific projects or students. An analogous process is the general physical examination, in which a small set of health measures are taken as a broad index of soundness, and more detailed and elaborate tests may be required if some of the broad measures suggest a problem. The analogy also extends to the fact that broad assessments and general physical examinations are most useful when they are periodic and regular; the most important insights to be gleaned from the current assessment are those measures which show a difference - either positive, negative, or neutral - from previous assessments.

2.1.1 Current Levels of Effectiveness

In the STEP design, effectiveness is measured by a set of 10-15 Indicators of Quality, scales used to describe the product or output of the school district as a whole. Each assessment measures the overall district on those Indicators of Quality. Selection of Indicators is a part of the system development process; among the candidates being considered are Drop-out Rate, College-Placement Rate, and others.

2.1.2. Current Allocation of Resources

Current year approved expenditures are reported by program category, rather than line-item account. Within each program, costs are aggregated by, Salary, Non-salary, and Capital Outlay expenditures.

The design of the program structure to be used will be completed during the remainder of the project. At present the plan is to aggregate expenditures by --

Grade-Level Cluster X School X Special Population.

In the assessment of resource allocation will also be special project expenditures, i. e., certain activities not equivalent to one of the programs, but, for special management reasons, having a separate accounting system.

2.1.3 Current Process Measures and Parametric Values

In addition to the Indicators of Quality, several other scales are used in the system, namely, those scales that

describe the general relationships among the resources and people in the district. These process measures serve two purposes:

First, they characterize some process measures of quality, such as "experience of teachers", "space/student", etc.

Second, they provide the relationships needed to compute the changing costs of the educational programs, such as "class size," "expenditure/student", "administration/instruction salaries", etc.

The process measures will also be selected during the development of the system.

2.1.4 Current Enrollment Data

A special, critical class of process data is the enrollment of the district. In STEP, enrollment will be reported as number of students/type/program. In Trenton, overall enrollments are not changing rapidly, but student types show changing distributions.

2.1.5 Current Revenue Data

Included also in the assessment is a summary of the revenues currently available to the district, by source, and, where appropriate, by special purpose. The ratio of the various sources to each other is one of the process variables mentioned earlier.

2.2 Planning Model

The planning "model" is a set of formulas and computer programs which converts one set of data into another. At this stage in STEP, the model receives the data from the

assessment phase, and computes several forecasts, namely, enrollment, indicators, process measures, costs, manpower, revenues. The planning model works on the assumption that certain ratios vary at a fixed rate (salaries), certain ratios stay the same (staff/student), and others are allowed to vary independently (total students).

2.2.1 The Enrollment Forecaster

As part of STEP development, a formula will be developed to predict student enrollments. Probably, some relationship between current enrollments, housing development, and birth rate will be employed.

2.2.2. Indicator Forecaster

Because the current state of educational theory has developed no scientific notion of how educational activities are related to outcomes, the prediction of future levels on the indicators of quality is necessarily subjective, involving a small group (3-4) of experienced educators.

2.2.3. Process Measures Forecaster

Process measures are forecast in three ways:

- they are calculated by assuming a fixed ratio, or a uniformly varying ratio
- they are computed as a consequence of those described above
- they are subjectively estimated, by the review group

2.2.4 Cost Forecaster

The cost forecaster, assuming the process changes computed above, expands (or contracts) costs as a function of units of service (change in enrollment), or adjusts costs in certain categories as a function of inflation factors.

2.2.5 Manpower Forecaster

Assuming constant staff to student ratios, the manpower forecaster projects the numbers of staff members, by type, as a function of enrollment changes.

2.2.6 Revenue Forecaster

The revenue forecaster projects the effects enrollment change, subsidy formula, and tax base change on the total revenues available to the district; assuming no change in tax rate. Certain classes of revenues which do not vary according to predictable rules are estimated subjectively, or assumed to be zero (certain non-continuing Federal grants, for instance).

2.3 The "Base Case"

The first output of the planning model is called the "base case"; the base case is a candidate plan, showing the effects of approving last year's plan, making no changes in policy or program.

The base case is produced in three consecutive versions:

1. The five year implications of enrollment change
2. The five year implications of inflation and enrollment change.

3. The five year implications of previously approved projects (not yet implemented), and inflation, and enrollment change.

The base case is plan - the "no change" plan. As will be shown below, it has the same elements as a new plan, but presumes no significant modification of existing programs.

2.3.1 Enrollments Over Time

The base case includes a print-out of the expected enrollments over time, by program and student type.

2.3.2 Costs/Program Over Time

The base case shows the cost implications of the current plan, as a function of inflation and enrollment change. These costs are aggregated by program and for the total district.

2.3.3 Process Measures Over Time

The base case includes five-year projections of the process measures, as a function of the manipulations discussed in 2.2.3.

2.3.4 Indicator Measures Over Time

The estimated effects on the Indicators are printed out for the five year period.

2.3.5 Staff Requirements Over Time

The base case indicates the number of positions, both new and existing, that will require filling in the five-year

period, as a function of both changes in overall faculty size and turnover rates.

2.3.6 Revenue Feasibility Over Time.

For each version of the base case, the anticipated costs are compared to anticipated revenues, and the needed change in tax rate is indicated.

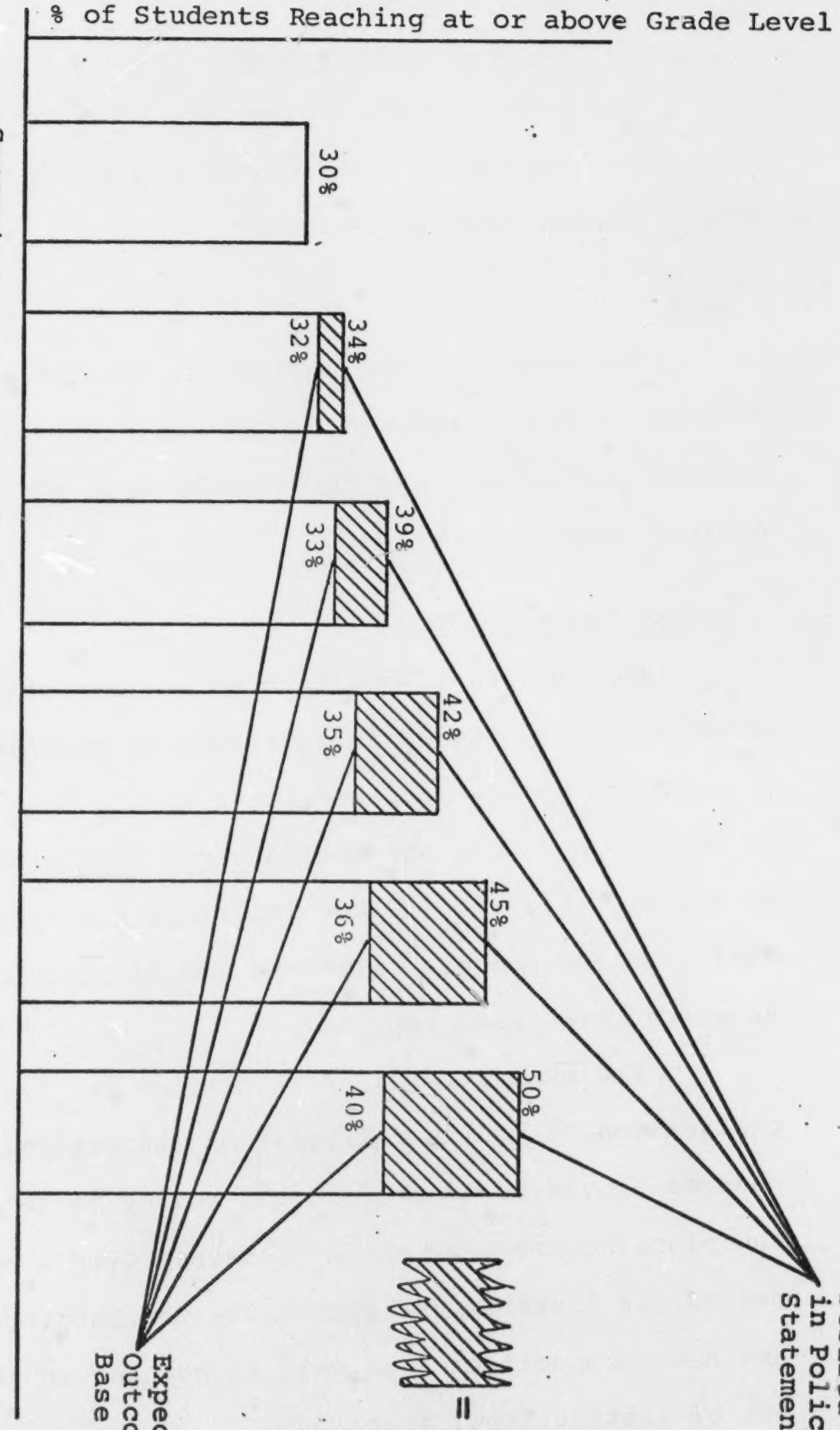
2.3.7 Gaps

The levels on the Indicators are compared to the desired levels (developed during last year's policy deliberation activities) and the gaps between the anticipated and desired levels are shown.

2.4 Policy Deliberations

The "policies" deliberated in this phase of the process relate only to those affecting planning. The most significant policy decision is to decide what the Indicators of Quality will be, and what desired levels will be pursued by the organization. Other important policies relate to limits on the process relations and parametric ratios, such as class size, salaries, etc.

The annual policy deliberation is, in fact, a review of last year's policy deliberation, to determine what, if any, changes should be adopted in the policy variables. Consequently, the planning process, while sustained over a multi-year period, is flexible and responsive to changing environments and new perspectives - as well as changes in the state-of-the-art of instructional practices.



Example of Indicator-Objective Relationship

(figure 2)

2.4.1 Goals and Objectives

The choice of Indicators is, in itself, a determination of goals. The problem of educational goal-setting is not so much a matter of deciding what ends are worthwhile, but, rather, choosing from among the wide range of desirable ends those that most characterize the administrative philosophy of the district. The goals of the district are simply to improve with respect to the indicators of quality; the objectives are to improve some specific amount, in a specific time period.

In figure 2 is an illustration of the Indicator-Objective relationship, for the Indicator: "percent of students reading at or above grade level."

(The numbers in this illustration are fictitious)

In STEP, an important element of the goal-setting process is an annual community survey which serves as a significant input to the Board and Administration.

2.4.2 Priorities

"Priority" is a measure of relative importance among the several objectives of the district. It can be expressed in at least three ways:

- a rough grouping of all objectives into high-, med-, or low-priority
- a ranking of all objectives from most to least important
- a specific weighting of the relative importance

of each objective, or of the units in each scale (e.g. 1% decrease in drop-out is twice as desirable as 1% increase in % reading at or above grade level)

Statements of priorities should be more than rhetorical. They must be specific and quantified, so that they will influence the subsequent resource allocation decisions.

2.4.3 Constraints

There are two kinds of constraints - formal and informal. Formal constraints are upper or lower bounds on certain process variables, such as tax-rate increase, square feet of construction/yr, etc. Wherever possible these formal constraints should be specified in the policy report, prior to the evaluation of new plans.

Informal constraints are those loosely defined feelings about what is or is not feasible, mainly political limitations on possible courses of action. Planners often discover these constraints after plans have been developed; thus, an inventory of constraints develops over the years.

In general, while it is necessary to work within constraints, it is unwise to presume the infeasibility of certain proposals to readily. Politics is defined sometimes as the "art of the possible", but the effective politician makes his own possibilities, rather than yielding to traditional, unchallenged notions about what can or cannot be done.

2.5 Design of Project Alternatives

Many school districts undertaking strategic planning for the first time believe that the battle is won when goals are agreed upon. In fact, goal-setting is only mid-way through the complete planning process.

One of the essential notions of systems analysis, of which PPB is a special case, is that it is possible to design alternative means to any set of goals and select rationally that alternative most likely to be effective and economical.

In STEP, once objectives (Indicator gaps) are agreed upon, several project design groups are created (or selected from existing groups), most containing staff, community, student memberships, to write proposals for achieving the objectives. Any proposed change in the operation of the school district is considered a "project"; projects may be additions to the district, deletions from the district (negative projects), or replacements (both a positive and negative proposal).

2.5.1 Project Proposals

STEP includes a project proposal activity, akin to (though less cumbersome than) the process of writing grant proposals. After the Board publicly announces its objectives (gaps that need to be closed), proposal development teams draft project designs. Project designs include the following elements:

- Expected impact on all indicators

- Proposed activities (including schedule)
- Estimated costs over time
- Rationale (research or investigation which supports the belief that this proposal will produce the desired results in the specified time.

Proposals must cover all costs, activities and outcomes for the five-year period - with Ø entries for years in which the project is not in effect.

The developing of proposals is an important opportunity for community participation; it is important however that the project writing teams realize that not all proposals will be approved! For this reason, the project design requirements should be no more arduous than necessary.

2.5.2 Review of Project Proposals

All proposals are submitted to a Review Group. This group, four-five professionals, reviews the competency of the proposals - but does not act on them. The concern of the review group is to make sure that the cost estimates are accurate and complete, that the estimated effects are reasonable, and that the rationale is credible. The review group may require re-writes of certain proposals.

Again, this group does not approve proposals; merely ensures that the estimates of costs and effects are believable enough for the next stages in the planning process.

2.6. Re-iteration of Planning Model

Depending upon how many proposals are actually submitted, the planners next consider the implications of approving every possible combination of projects, or many possible combinations. Using the same planning model which converted assessment data to the "base case", project combinations are fed into the program and costs and outcomes are "added on" to the base case plan. (In the case of negative projects, costs and outcomes may be removed from the base case.) This stage of the process is a simulation of the consequences of approving alternative plans of action. Each combination of projects generates a plan with as much detail as the "base case", including gaps that remain to be closed and indications of revenue feasibility. Sometimes this activity is known as the "what if..." stage; it is the essence of planning.

2.7 Selection of "Best Case"

The task of the planners is, now, to judge which of the possible alternatives (including the "base case") is the "best" course of action.

STEP allows this selection to be based on quantified criteria of desirability - both in terms of costs and desired outcomes.

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2.7.1 Cost-Benefit Comparisons

Each alternative plan is characterized by a unique estimated cost and unique estimated set of outcomes. These outcomes are aggregated as a function of the priorities and size of remaining gaps associated with each alternate, so that each plan can be described as having a single benefit and single cost. (This process can be done informally, or formally, through any of several benefit estimating procedures, depending upon the willingness of the planners to make specific statements of personal value and utility.)

Alternative plans are arrayed, then, in ascending order of cost, as shown in figure 3.

(In the example shown, one alternative involves a large negative project, and, thus, is less costly than the base case.)

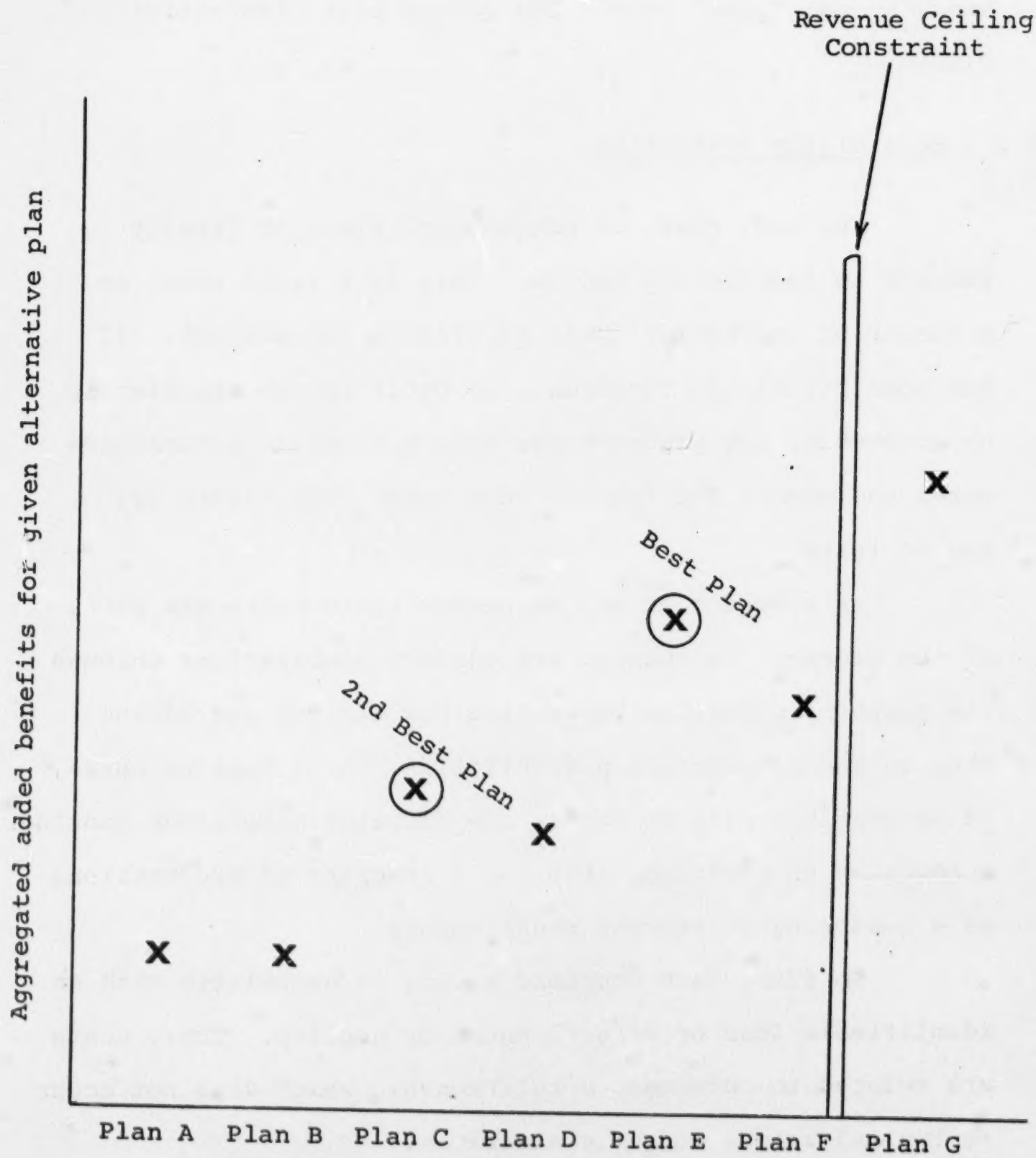

Illustration of Cost Benefit Comparison

Figure 3

In this illustration, any of the plans A-F are within the maximum feasible cost. Note, though, that Plan E, while less expensive then F has a larger benefit prediction and, thus, is the "best" case. The second best alternative is Plan C.

2.7.2 Feasibility Evaluation

The best case, or recommended plan, is finally subject to feasibility review. This is a final check on a number of assumptions made earlier in the project. If for some political, financial, or other reason the plan is unacceptable, the planners may return to their alternative cases and submit the "second best case" (see figure 3), and so forth.

In practice it may be necessary to reiterate parts of the process, by running new project combinations through the planning model, or by writing new designs and adding them to the alternative possibilities. As a last recourse, if no feasible plan is found, the decision makers may consider a revision of policies, that is, a lowering of expectations or a loosening of process requirements.

In STEP, each economic saving is associated with an identifiable loss of effectiveness or quality. Thus, costs are related to outcomes, a relationship which does not occur in typical school budget evaluations.

2.8 Generating Year 1 Budget

Approval of the multi-year plan, is, in effect, an approval of the operating budget proposal for the next year - even though the detailed budget has not yet been written. In strategic planning, the decision point is moved back to the pre-preparation stage, and the actual budget preparation flows almost automatically from the approved plan.

In STEP, a plan is defined as the base case (or previous plan), plus some projects. Developing the operating budget, then, merely requires that the line-item version of the current year budget be modified by adding the line-item expenditures of the approved new projects for the first year of the plan (probably to be modified somewhat as a result of salary agreements not yet resolved during the planning period).

It is imperative that all persons in a position to approve or reject the proposed operating budget have already seen and accepted the program-budget in the multi-year plan.

2.9 Evaluation - Monitoring

In addition to the district-wide assessment, the projects added on the educational programs are evaluated and monitored in some detail, to see that activities occur as planned, and whether expected outcomes do occur.

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2.9.1 Project Control

Projects are more easily managed and controled than the general programs. Unlike the broad programs, projects are not guaranteed perpetual life in the district; they can be scrutinized, modified, or even eliminated much more easily than the basic programs.

The purpose of project evaluation and monitoring is to assist the district in achieving its objectives, not merely to find fault.

2.9.2 Changes in Management Control

Over several years of planning, a larger and larger proportion of the activities of the district will be in these carefully designed and monitored projects, and, consequently, the management control of the district will be enhanced. Projects generally have project directors, who, in turn, have management plans. Thus, the successes and failures of the district can be more accurately associated with specific staff members. This change will enhance the accountability of the District to the community and enable the Board and Executives of the schools to better evaluate themselves and produce change and improvement.

And, further, the more projects are designed, installed, monitored, and evaluated, the better the planners and project design groups will become at devising and evaluating alternatives.

Trenton EPPBS Project

Progress Report

March, 1971

GSS

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Past Month's Activities

1. The most visible project activity in March was the completion of the Trenton Community Opinionnaire. The form was finalized - including a consultation with Opinion Research, Inc. of Princeton - printed, ran in Trenton's two newspapers (on March 28 and 29), and was distributed through the entire student body. At this writing, a few returns have already come in.

2. Other major activities included work modifications of the EPPBS enrollment forecaster and revenue forecaster. Members of the project team have been collecting historical data about enrollments and revenues.

   The revised enrollment forecasting model will project enrollment, by program, by Belmont Student - type, and be ready for use before the end of the first project year.

   The revenue forecaster will reflect the new "Bateman" subsidy formula, and have the capability to forecast different levels of funding as a function of the district's varying Bateman classification on the "basic - comprehensive" scale.

3. A tentative program structure has been developed, as a basis for both enrollment forecasting and program budgeting. A preliminary description of the structure, and a sample program description sheet, appear at the end of this report.

4. The preliminary design report ("STEP") has been distributed to the technical advisory group and will be the subject of the next meeting.

Coming Activities

1. The returns from the Community Opinionnaire will be coded, key-punched, and analyzed.

2. The results from the survey will input to the selection of Indicators, and the design of the planning information system

3. The continuation grant for the project will be developed

4. The teacher orientation sessions will begin.

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Program Structure and Program Description

In PPBS, a "program" is defined as a cluster of related activities directed toward a set of objectives. Moreover, each program is viewed as a separate cost center, and, possibly a separate management responsibility. In the program budget, moneys are displayed by program and subprogram, rather than by the line item accounts.

In the STEP design there are three program areas:

Management - Policy Area

Business - Support Area

Instructional Area

Each of these areas contains one or more programs and projects, each of which has a separate accounting in the program budget. In addition, the programs under instruction are divided into school sub-programs.

The following is a tentative description of the structure of each of these program areas.

Management - Policy Area (Area I)

I. 1	Executive Services - Superintendent and Board of Education
I. 2	Research, Planning, Evaluation, and Development
I. 3	Information and Community Affairs
I.4	District-Wide Curriculum Supervision (incl. Libraries)

Business - Support Area (Area II)

II. 1	Financial - Legal Services
II. 2	Transportation Services
II. 3.	Food Services
II. 4	Health Services
II. 5	Personnel Services
II. 6	Pupil Services
II. 7	Facilities - Maintenance - Operations
II. 8	Construction - Debt Service

Instructional Area (Area III)

III. 1 Early Childhood Education (Grades pre-k)

III. 1. n (school or site)

III. 2 Primary Education (Grades 1-3)

III. 2 n (school or site)

III. 3 Elementary Education (Grades 4-6)

III. 3 n (school or site)

III. 4 Intermediate Education (Grades 7-9)

III. 4. n (school or site)

III. 5 Secondary Education (Grades 10-12)

III. 5. 1 Vocational - Tech. Ed.

III. 5. 2 College - Prep Ed.

III. 5. 3 Commercial Ed.

III. 5. 4 General Education

III. 6 Continuing Education (adult)

III. 6. 1 Evening High School

III. 6. 2 Other Programs for Adults

III. 7 Handicapped Education

III. 7. n (grade cluster)

III. 7. n. n' Type of Handicap

The programs and sub-programs in the Instructional Area are defined in turns of the cluster of students they serve. The performance of the students in that cluster on the district's indicators of quality measures is the measure of that program's (or sub-program's) success. Presumably, each program or sub-program has an accountable manager or director - although one person may be responsible for more then one program or sub-program. Note that the school district has objectives, each program has objectives, and each sub-program has objectives, and these are, presumably, top-down or bottom-up consistent.

Each program or sub-program has a program description in the planning information system, which is updated annually. The following is a suggested program description format.

Program Description Format

(For Instructional Programs and Sub-programs)

Program Area_____

Program Name_____

Enrollment (year_____)

Black	_____
White	_____
Spanish Surname	_____
Other	_____
Total	_____

Staff (direct)

Type	_____	Number_____
Type	_____	Number_____
Type	_____	Number_____

Vacancies

Type	_____	Number_____

Average Salaries

Type	_____
Type	_____

Program Accounts

Each Program will be a category in the Program-Budget. The following cost data will be shown under

Past Year Actual _____

Current Year Approved _____

Plan: Year 1 _____

Plan: Year 2 _____

Plan: Year 3 _____

Plan: Year 4 _____

Plan: Year 5 _____

The accounts of expenditure are:

Direct

Professional Salaries _____

Professional Benefits _____

Non-Professional Salaries _____

Non-Professional Benefits _____

Non-Salary Outlays _____

Capital Outlays _____

Total Direct _____

Indirect

Overhead Salaries and Benefits (Directly Calculated _____

Overhead Salaries and Benefits (Pro-Rated) _____

Non-Salary Costs (Directly Calculated _____

Non-Salary Costs (Pro-Rated) _____

Capital Outlay (Pro-Rated) _____

Average Turnover Rates

Type_____

Type_____

Average Class Size (Teacher-Student Ratio) _____

Staff Ratios

Admin: Instructional_____

Instructional: Other_____

Total Direct Expenditures for Program

Year - 3	Year - 2	Year - 1	Current Year
_____	_____	_____	_____

Direct Expenditure/Weighted Student

Year - 3	Year - 2	Year - 1	Current Year
_____	_____	_____	_____

Revenue Sources (Current Year)

Non-Categorical Local Funds _____

Non-Categorical State Funds _____

Non-Categorical Federal Funds_____

Categorical Funds

_____ _____

_____ _____

Total Revenues _____

Performance Measures (Indicators)

Measure Last Year_____

Current Year_____

General Program Description

(one narrative paragraph)

Note that there are two kinds of overhead:

- overhead specific to the program,
  such as a program supervisor
- overhead pro-rated to the program,
  such as a district-wide supervisor

DESSEMINATION PLANS AND ACTIVITIES

DESSEMINATION PLAN - EPPBS

I. EXTERNAL DESSEMINATION

A. Establish a system of communication exchange with local, state, and national organizations which may provide information, data, and services useful to a district-wide planning operation.

1. Specific activities:

a. Mail "contact" letter requesting materials and services information.

b. Develop a file of organizations and groups and their activities and services, available at no cost and at cost, for use by district personnel.

c. Prepare brochure of project's goals and activit

d. Develop set of handouts (mimeo) describing various phases of the project.

e. Offer a one-day conference to Mercer County Superintendents to inform them of progress.

B. Maintain a regular program of informing the public of progress on developing a district-wide planning network.

1. Specific activities:

a. Frequent news release.

b. Prepared program for presentation to public meetings, e.g. Trenton Evening Times Forum program.

c. Request for feature story of project activities

1. Letters to local papers

2. Letter with news release to NEW YORK TIMES and PHILADELPHIA INQUIRER

3. Letter to TRENTON MAGAZINE and NEW JERSEY SCHOOL BOARD JOURNAL

II. INTERNAL DESSEMINATION

A. Develop a regular chain of communications with local education staff and personnel.

1. Specifie activities

a. Conduct inservice sessions reviewing and explaining a comprehensive planning service.

b. Develop an information sheet (newsletter) to maintain a regular medium of information.

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TRENTONIAN - September 30, 1970

City's Bid For School $ Due Today

What are the schools doing? How could they perform better, without massive increases in spending?

Those are the $64,000 questions in education. Trenton Shool officials today will hand in their final proposal for a $64,000 answer.

The Trenton system is seeking a $64,000 grant to establish a "Comphrehensive Planning Center" that would devise methods for evaluating the entire education system here.

Assistant Supt. Pasquale Maffei said the evaluation would cover the gamut — learning, teaching, administrating, community involvement— and would be followed by a study of possible improvments in the operation.

"The center will evaluate alternative approaches in programs: Reading, science, Health, Social Science and so forth," said Maffei.

Also, he said the center would seek a technique of relating an activity's cost to its output.

In studying say, reading instructions, planning center experts would ask: Is this one of the best ways? What does it cost? Is there a better way? Is it worth the difference in cost?

These questions, Maffei noted, are "extremely important in a city like Trenton, where the supply of education dollars is severely limited."

School officials today will submit the final details on their proposal for the $64,000 state-federal grant, which would fund center operations from Mid-October to the end of the school year.

According to the plans David E. Weischadle, appointed center director yesterday, would supervise development of a planning model development by Goverment Subsidies & Sytems Inc., of Philadelphia.

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TRENTON TIMES - August 19, 1970

Weischadle Named School System Planning Director

By LARRY KELLEY
Staff Writer

The Trenton Board of Education has named an educational specialist with the New Jersey Urban Schools Development Council as director of Research and Evaluation for the school system.

Dr. David E. Weischadle, of 6 Ribsam Street, will begin the job on Sept. 1 at a 12-month salary of $16,500

He will head the school board's new office of Program Planning, Research and Evaluation which will be established this year through $74,000 in state funds.

The new office will implement a five-year plan for a Planning Programming Budgeting System (PPBS) which attempts to account for spending in terms of pupil benefits.

Solve Planning Problem

Weischadle, 29, will head a department which is attempting to solve one of the school system's major problems — planning — according to at least one study.

Consultants from the Drexel Institute of Technology have found that planning is "fuzzy and vague," and Pasquale Maffei, assistant superintendent for curriculum, recently noted that school administrators have been aware of the system's planning deficiencies for many years.

Only one school board member — Mrs. Barbara Potkay — voted against the new position at last Thursday's public school board meeting.

Necessity Questioned

She questioned the "necessity of the position" and commented that State Education Commissioner Carl L. Marburger had disallowed it in the board's 1969-70 budget.

Marburger had restored $773,000 to the budget after city council cut $1.3 million, but the restoration did not include money for the position of direction of Research and Evaluation.

Weischadle, a former teacher in the Edison school system, received his bachelor of science degree in education from Rutgers University in 1963. He received his masters degree from Rugers a year later and his doctorate this year.

In other board action, William Applegate has been transferred as principal of the Jefferson School to the same position at the Cook School. Also, orientation for new teachers was set for Sept. 1 and 2.

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THE MONITOR, October 2, 1970

Director of Planning Named For Trenton School System

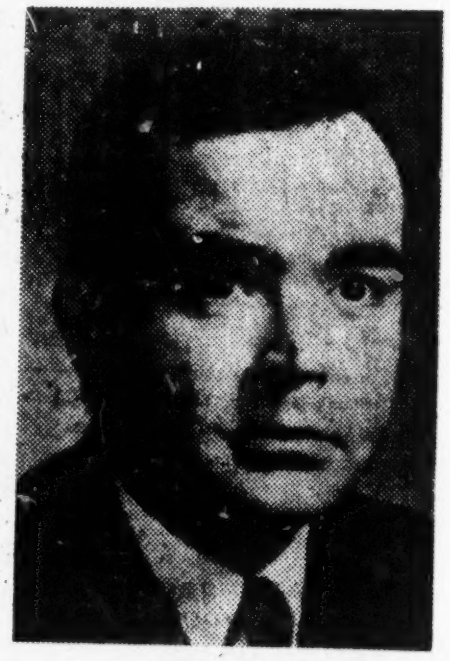
Dr. David E. Weischadle, an educational specialist with the New Jersey Urban Schools Development Council, has assumed his new duties as director of planning, research and evaluation in the Trenton public school system.

The 28-year-old educator heads a department which is attempting to solve one of the school system's major problems —planning. His task will be to implement a five-year plan for a Planning Programming Budgeting System which will attempt to account for spending in terms of pupil benefits.

Dr. Weischadle resides with his wife, the former Mary Ann Piscopo, and their son, David II, at 6 Ribsam Street, Trenton. They are parishioners of St. Joachim's Church.

A former teacher in the Edison school system, Dr. Weischadle received his bachelor of science degree in education from Rutgers University in 1963; his master's from Rutgers a year later, and his doctorate in education this year.

He has written extensively for such publications as The Social Studies, Education, Peabody Journal of Education, International Review of History and Political Science, The New York Times, The Education Digest, and the Illinois Schools Journal.



Dr. David E. Weischadle

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WEDNESDAY, NOVEMBER 11, 1970

Watson To Check HEW About Community School

By LARRY KELLEY
Staff Writer

Would students get better grades in a school operated by the community? The Trenton school board is playing with the idea of finding out.

The board yesterday gave School Superintendent Dr. Ercell I. Watson the green light to explore the possibilities of starting a federally funded community school in Trenton.

The school board could receive up to $22,500 to explore the possibilities of a community school and to set up the program. This would be the initial funding of a total package of $225,000 the board would receive from the U.S. Department of Health Education and Welfare (HEW) once the program begins.

Try One First

Watson said yesterday that he would like to start with one school to see how successful the concept would be in Trenton. He said he would not be willing to simply turn a school over to the community, but would rather see a community school board working in collaboration with school administrators.

The program would involve the selection of a school and then the election of a community school board for that school. The community school board would operate autonomously from the city school board.

Watson said the idea of the plan is to "give the community a chance to make decisions" by giving the community control over a particular school.

Not CRC Plan

The Citizens Reaction Committee (CRC), the city's anti-busing group, is attempting to set up their own community school in Chambersburg to continue their boycott of city schools. The CRC plan is not connected to the HEW proposal to fund a community school in Trenton.

Also discussed at a board instruction and personnel committee meeting yesterday was the school board's new Office of Program Planning Research and Evaluation, which recently has been funded by the state for $63,000.

Dr. David E. Weischadle, who heads the new office, explained that the idea is to "attack the total problem of putting ideas into workable programs."

The planning office will work in conjunction with the office of Secretary-Business Administrator Thomas Mitchell in preparing budgets and it will help the school board, teachers and administrators in planning objectives for the school system, Weischadle said.

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THE TRENTONIAN, WEDNESDAY MORNING, NOVEMBER 11, 1970 •

Community Control Of Schools Eyed

The parents, teachers and neighbors of a Trenton school would get partial control of its operations, under a $225,000-federal proposal unveiled yesterday.

Submitted to the Trenton School Board the proposal would institute some community control over one test school to determine whether or not this "community involvement" procedures better education.

The board, meeting in a committee session also heard reform proposals for:

—A $99,000 - mathematics improvement program, funded through a state consortium.

—Expansion of the bilingual program begun this September for Spanish speaking students.

—New math, reading, social studies and science programs for 1st, 2nd and 3rd graders in five elementary schools.

—More school board involvement in the system's new $63,400-comprehensive planning project.

— A feasibility study, suggested by a United Progress, Inc., executive to determine whether Trenton could test the controversial "voucher system" for free competition among schools.

All these projects would be funded by federal and state government grants.

The U.S. Health, Education and Welfare Department indicated it will spend up to $225,000 to test the worth of partial community control of schools.

Inviting Trenton to apply for the money, the agency said it is seeking a plan for a community-school council which would have some control over curriculum, staff training and general management at one designated school.

The school board members

(Continued on Page 45)

(Continued from Page Two)

expressed some interest, told Assistant Supt. Pasquale Maffei to get more information from the federal government and from state, teachers and anti-poverty agencies that might be involved.

Maffei also was instructed to seek a $99,000-math reform grant from the N.J. Urban Schools Development Council.

If approved, the grant would allot $11,000 for charting of a new math program, $28,000 for its operation next semester and $60,000 for operation during the 1971-72 school year.

The system's new planning center, established with a $63,400-state grant, is just beginning operations, reported Research Director David Weischadal, who expressed hope for close school board contact with the project.

Maffei then reported that Educational In-Service Consultants, a Florida firm, is drawing up plans for new language, arts, math and science programs that would be tested in five elementary schools, under a federal grant.

Walter Sullivan, United Progress Inc., executive told the board that federal money is probably available for a feasibility study to determine how the "educational voucher system" would operate in Trenton.

That system — a multi-million dollar project — would allow parents to enroll their children in schools of their own choosing.

The board listened to Sullivan, but took no action on the proposed study.

—STUART ROSE

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SUNDAY TIMES ADVERTISER

Our Changing Schools

Improvement Of Curriculum Is A Never-Ending Battle

By DONALD S. ROSSER
New Jersey Education Assn.

Curriculum improvement i a never-ending responsibility in every school system. Heeding cries of "irrelevance," educators now are proposing change not only in actual course content but also in the method used to achieve improvement.

"A change in direction is required," says Dr. David E. Weischadle, director of research, planning, and evaluation for Trenton public schools. "We must change from a curriculum for all students to a curriculum for each student."

To accomplish this shift in focus, Weischadle believes that students and the "community" itself should be given a role in developing the local school district's curriculum.

When educators construct the curriculum alone, Weischadle says, the emphasis is often on subject matter rather than on students on what is taught rather than on what is learned. The curriculum is thus a prescription dished out by an expert rather than a selection by the student based on what he needs to learn and wants to become.

The standard model for curriculum development can cut student achievement and teacher efficiency. When the student doesn't particularly want to take the prescription, he becomes a reluctant learner. Says Weischadle, "It is left for the classroom teacher to spark an interest in the student for the courses he is taking."

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SUNDAY TIMES ADVERTISER

March 28, 1971 -- Page One

What's Your View Of Schools? Here's A Chance To Say It

Trenton residents are being asked to tell the city school board just what they think about the school system.

A questionnaire provided in today's Sunday Times Advertiser will also be distributed to teachers and school administrators and given to students to take home.

City residents who are 18 years of age or older are urged to fill out the questionnaire and submit it to the Board of Education at 9 South Stockton Street by April 2 to help administrators "in developing some priorities for the coming (school) year."

The project is being coordinated by the school board's office of Planning, Research and Evaluation which was established this year through a $74,000 state grant.

Fund Use Stressed

Dr. David E. Weischadle, director of the office, said school administrators are "looking for the general, overall feeling of the community towards the schools."

"There's a shortage of funds in Trenton," Weischadle said. "So we have to know where to spend the funds — where people want us to spend the funds."

Parents, students, teachers, and school administrators will come together this fall to discuss ways to "meet some of

Form Appears Page 12, Part 2

the needs" expressed in the questionnaires, Weischadle said.

He added that the opinions would be coupled with findings from other reports and staff input in establishing priorities for the schools system.

Bilingual Papers

A bilingual questionnaire for Spanish-speaking residents will be distributed to students to take home this week.

School Superintendent Dr. Ercell I. Watson said this is perhaps the first time a public school system has gone to its citizens in this way.

The experiment is the result of the work of a Technical Task Force formed several months ago to assist in planning for the school system.

The task force includes representatives of the Trenton Education Association (TEA), the Trenton Federation of Teachers (TFT), the New Jersey Department of Community Affairs, Model Cities and United Progress Inc., the city's anti-Poverty-agencies, the New Jersey Urban Schools Development Council, Research for Better Schools of Philadelphia and local school administrators.

In addition to rating various aspects of the school system, citizens also have the chance to "give one piece of advice to the Trenton Board of Education."

BUILDING A COMPREHENSIVE PLANNING CAPABILITY MODEL WITH EPPBS

Project Director: David E. Weischadle
January 1971
Trenton Public Schools

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Needs

This project has been designed for the Trenton School System to:

1. Provide the Superintendent, his staff, and the Board of Education with a comprehensive systems planning instrument for making policy decisions and allocating resources
2. Involve, meaningfully, the community, its agencies, parents, the students, and the system's instructional staff, in the making and implementation of decisions regarding educational priorities;
3. Reorganize the planning and data collection services of the system under a director of planning

Purposes

The purpose of this project is to make fully operational a planning system at the end of the 36 month contract period. Specifically, the systems model developed would provide for Trenton, for the first time, a comprehensive planning instrument. The project is designed to implement, as our response to the need for a total program planning capability, an Educational-Program-Planning-and-Budgeting System. Further, such internal reorganization of staff as may be required to properly operate such a system will be promptly implemented.

The procedures to be followed, and the records maintained, will serve as an exemplary model for other school systems desiring similar capabilities. The operation of the program planning model will be maintained and fully financed by the Board of Education at the conclusion of funding under Title III, ESEA.

Determination of Needs

A joint city-state Task Force, composed of representatives from the L. E. A., the S. E. A., Urban Schools and Model Cities, was organized to assess and review the needs of the school system for planning. This group

met regularly over a three month period. This project represents the distilled effort of many meetings, and honest differences of opinion in approach. The task force experienced in its own evolution as a planning group the necessity of acquiring new and demanding skills. These frustrations have not been resolved, but with the group's approval of proposing the establishment of an Educational-Planning-Program-and-Budgeting System a critical first step in bringing order out of disorder has been made. The Superintendent and his staff are committed to instituting systems and accountability procedures throughout the district and will supplement the initial work on establishing EPPBS with additional staff and funding beyond that provided by the proposed Title III, ESEA grant. The rationale for developing these priorities consisted of two basic elements:

a. The need to respond in a constructive way to the community's demands for improved educational services, and
b. The critical need of securing, through the development of professional planning expertise, additional sources of funds for program emphases, both within the existing revenue framework, and through accessibility to federal and state funds.

Trenton and EPPBS

The implementation of the modified Educational-Planning-Programing-Budgeting System (EPPBS) in the Trenton Public School System will provide the Board of Education, the Superintendent and his staff with the ability to:

1. Test the educational impact of various allocations of resources to continuing programs and new projects;
2. Develop plans that are directly related to educational activities;
3. Translate the plans into budgets strongly supported by realistic estimates of the probable educational impact; and

4. Plan far enough into the future (five years) to achieve the program continuity needed to cope successfully with the educational problems of the district.

The EPPBS is a series of planning techniques for dealing more effectively with the increasingly complex task of managing educational resources. These techniques are supported by computer programs that use the knowledge and experience of the professional personnel involved in the planning processes to develop multi-year forecasts of educational requirements and the cost-performance impact of plans designed to meet those requirements. The EPPBS techniques include: (1) measuring progress toward objectives; (2) forecasting enrollment; (3) forecasting revenue levels; (4) estimating costs, including manpower requirements; (5) designing more effective projects; (6) estimating the impact of these projects; (7) preparing multi-year plans; (8) judging the comparative merits of alternative plans; and (9) developing an annual budget.

The modification and implementation of the EPPBS will span a period of approximately 33 months beginning October 15, 1970 and terminating June 30, 1973. Government Studies and Systems, Inc. (GSS) will guarantee a fully operational planning system at the end of the 33 month period. All professional personnel and Board members, and selected individuals from the community and other agencies offering education programs will be oriented in the use of the System and the maintenance of its major components.

The modification and implementation effort is predicted on several assumptions:

1. Phase I will be devoted to orienting professional staff, members of the Board, and selected members from the community and other agencies offering education programs. Modification of the System will begin during this phase. Training of key professional

personnel will begin and continue through the modification, testing, debugging, and cycling activities of Phases II and III. (These people will be thoroughly trained, at the end of Phase III, in the operation and maintenance of the EPPB System.)

2. Phase II's effort will be devoted to completing the modification of the EPPB System, testing and debugging the System, and continuing the orientation and involvement of the professional staff, Board and indivisuals from the community and other agencies.
3. Phase III's effort will be devoted to the first implementation, evaluation and adjustment process. A multi-year plan covering the fiscal years from 1973-74 through 1977-78 and an annual budget for the 1973-74 fiscal year will be produced. Orientation and training of professioaal staff will continue during this phase. Training of key personnel in the maintenance and operations of the System will be completed at the end of this phase.
4. The orientation program will involve members of the Board of Education, Superintendent and his staff, and building principals and their staffs, and selected individuals from the community and other agencies.
5. Personnel of the School District will actively participate in the modification and implementation efforts (Task 4.0).
6. The training of the teaching staff (Task 3.0) will be organized by building.
7. The Trenton School System will provide clerical assistance for the personnel of the School District.
8. The equivalent of a full time professional will be assigned to the project over a three year period by the Trenton School District.

9. The modification of the EPPBS will be so designed as to accommodate both planning at the School District level and at the building level.

The estimated cost for modifying and implementing the System will be $94,240. The cost for the period from October 15, 1970 through June 30, 1971 will be $40,110. The cost for the period from July 1, 1971 through June 30, 1973 will be $15,720.

Funding

The predominant cost of instituting a comprehensive planning capability is in the financial provisions for consultative and computer programing assistance in setting up such a capability. These costs will have been met by the end of Year Three and the phasing out of Federal support. The performance sub-contract with Government Studies and Systems, Inc., (GSS) guarantees an operational and debugged system as a part of their fixed cost contract.

In Year Four the L. E. A. will need to pick up the salaries of the System's Research Analyst. Other costs will indlude the secretary's salary ($5,000), the on-going training costs in conjunction with community and agency participation ($5,000), materials and supplies ($2,000) and rental of computer time ($2,000).

The implementation of this program is virtually assured since with a reorganized and systematic approach to planning the personnel and financial necessities can be written into future budgets as priorities for funding.

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SUMMARY PAGE

Project Title: "Building a Comprehensive Planning Capability Model With EPPBS"

Time Span: The project would begin October 15, 1970 and would become an operational system by June, 1973 (33 months) - Page

Total Cost: $193,200

Phase I - October 15, 1970 - June 30, 1971
$63,200

Phase II - July, 1971 - June 30, 1972
$65,000

Phase III - July, 1972 - June 30, 1973
$65,000

Source of Funding: Title III, State Department of Education

The total cost for this project will be borne by a Title III Grant (ESEA 1965) under the aegis of the New Jersey State Department.

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EDUCATION

OUTSTANDING EDUCATORS OF AMERICA, 1970 edition, lists Trenton State's Dr. Helen M. Carpenter, Dr. Dorothy G. Petersen and Dr. Felix E. Hirsch.

New Director of Admissions for Mercer County Community College is Michael J. Schaefer of Mercerville.

Visiting professor at Trenton State from University of Frankfurt, West Germany is Dr. Rudolph M. Vogel.

Mercer County Community College has highest enrollment ever, 2,200 full-time and 2,500 part-time students, according to President Dr. Richard K. Greenfield.

The new Student Union Building at Trenton State will have Robert J. Duesterhaus as director.

No time out for student politicking is the policy approved by Rider College faculty and students, President Dr. Frank N. Elliott announced.

Trenton State College has 1,170 freshmen this fall, and a total full-time enrollment of 4,300.

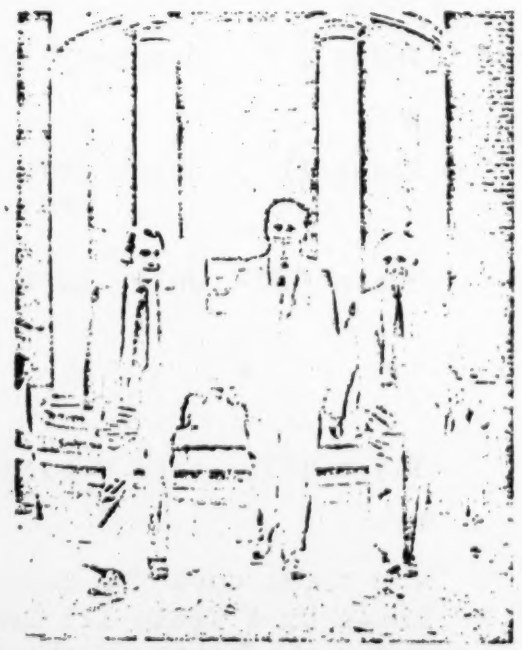
Newly formed Department of Criminal Justice at Trenton State has Professor Donn Herring as acting chairman.

Rider College has more than 3,500 full-time day students this year, and a new Student Center.

WEISCHADLE

Trenton Public School System has a new office of Program Planning, Research and Evaluation. The Director, Dr. David E. Weischadle, is married to a Trenton native, the former Mary Ann Piscopo.

Lawrenceville School has a new study center for popular American music, housed in the John Dixon Library. Named the Robert Thiele Center for Popular American Music, it will have sound recordings, tapes, musical scores, composers' notes and other matter covering the era since the first recording of sound. Mr. Thiele is head of a record company and an alumnus of Lawrenceville School. The Center's official inauguration will be on Friday, November 20, with a concert by B. B. King at the Kirby Arts Center on Lawrenceville School campus.



From left are Robert Thiele of Flying Dutchman Productions, Bruce McClellan, Head Master of the Lawrenceville School, and John A. Ellis, chairman of the Music Department at Lawrenceville School. All are directors of the new center.

Princeton University Observatory is holding open house for the public from October 7 through May 5, 1971. Illustrated, non-technical lectures and the chance to view the skies through the 4-1/2 and 9 inch telescopes atop Peyton Hall are offered. The place — Peyton Hall, Princeton University campus, and the time — 7:30 to 9:30 p.m. on October 7, November 4, 1970; January 6, February 3, March 3, March 31, and May 5, 1971.

Coming cultural events at Mercer County Community College include lectures by Warren St. James on October 22 and Gerald Schaflander on November 12 in the Times Community Room, and a performance by Carl Frazier on November 19 in Junior Five Elementary School.

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AN EDUCATIONAL-PLANNING-PROGRAMMING-BUDGETING SYSTEM FOR THE TRENTON PUBLIC SCHOOLS

YEAR TWO PROSPECTUS

Dr. David E. Weischadle, Director
Research, Planning, & Evaluation

April 1971

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Long-Range Goals of the Project

The purpose of this project is to develop a fully operational planning system by the end of the 36-month contract period. Specifically, the system developed will provide for Trenton, for the first time, a strategic planning approach. The mission of the project is to design and implement an Educational-Planning-Programming-Budgeting System (EPPBS).

The benefits of the system will include:

1. Providing the Superintendent, his staff, and the Board of Education with a strategic planning system for making policy decisions and allocating resources
2. Involving the community, local agencies, parents, students, and district's instructional staff, in the making and implementation of decisions regarding educational priorities;
3. Reorganizing the planning and data collection services of the system under a director of planning.

Using the system, Trenton policy-makers will be able to:

1. Test the educational impact of various allocations of resources to continuing programs and new projects;
2. Develop plans that are directly related to educational activities;
3. Translate the plans into budgets strongly supported by realistic estimates of the probable education impact; and
4. Plan far enough into the future (five years) to achieve the program continuity needed to cope successfully with the educational problems of the district.

Year-One Accomplishments

To date, the project has completed the following development tasks:

1. Established an Office of Planning for Trenton Public Schools.

2. Developed a management, evaluation, and dessemination plan for this project.
3. Conducted orientation sessions for the entire administrative staff of the district.
4. Developed a coordinating council made up of school district administrators.
5. Developed a Technical Task Force of educational and community agencies.
6. Conducted a Trenton community opinion study.
7. Conducted an analysis of Trenton enrollment and revenue histories.
8. Developed a conceptual model for the planning system.
9. Developed preliminary designs for:
   a. Revenue forecasting
   b. Enrollment forecasting
   c. Cost-Staff resource forecasting
   d. Project Design Procedures
   e. Cost benefit evaluation procedure
   f. Program structure and program accounting format.

Project Objectives for Year Two (FY 71-72)

In the second year of the project, the staff and consultants will:

1. Complete the orientation and training of all affected parties.
2. Design and install a planning information system.
3. Design, test, de-bug, and refine all manual and automated procedures to be used in the planning system, including procedures for:
   a. Forecasting enrollment
   b. Forecasting revenue
   c. Forecasting cost-staff resource needs
   d. Simulating the cost and benefit of alternative plans.

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By the end of Year Two, all preparations will have been made, and all design work completed, so that a complete "dry run" of the planning cycle can be exercised in Year Three of the project.

Project Funding

Year Two of the Project will be funded by an ESEA, Title III grant; this is the second of a three-year program grant.

The budget for Year Two is shown in summary form below:

	Salary	Fringe Benefits	Total
Director	17,700	1,770	19,470
EDP Coordinator	15,000	1,500	16,500
Secretary	5,000	500	5,500
Printing			800
Travel			200
Materials			300
*Consultants, Government Studies and Systems			40,750
			83,520

ORIENTATION PROGRAM

January 6, 1971

EPPBS - TITLE III
MASTER ORIENTATION SCHEDULE

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Date Time	Audience	Location	Length of Session	Comments	Next Session
January 21, 1971 1:30-3:00	Elementary Principals	Washington School	1½ hour		
January 25, 1971 9:30-11:30	District Administrators & Central Office Staff	Education Annex	2 hours		March 22, 1971 9:30-11:30
January 28, 1971 1:30-3:00	Secondary School Administrators-- H.S. Department Chairman	Vocational wing, conference room--TCHS	1½ hours	Alternate location--Education Annex	
February 12, 1971 10- 10:30	Board of Education (Conference)	Vocational wing conference room--TCHS	½ hour	Discussion Leader Dr. David Weischadle Trenton Public Schools Mr. Edmund Weiss Government Studies & Systems	March 9, 1971 10-11 a.m.
Spring	Elementary and Secondary School Staff		1 hour	Cluster plan to be developed	

TC3

EGB-3-6-70-FD.

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BOARD OF EDUCATION
ADMINISTRATION BUILDING
TRENTON, N. J.

SUBJECT: In-service Briefing, EPPBS

TO: Central Office Staff
Directors
Supervisors and Coordinators
and other Administrative Personnel

DATE: January 12, 1971

In order to assist you in understanding the development of an Educational Program Planning Budgeting System in the Trenton Public Schools, Dr Watson has asked that a special in-service session be prepared. The session will attempt to give you an overview of PPBS and answer specific questions you may have.

The first such session will be held on Monday, January 25, 1971, in the Art Room of the Education Annex, 434 East State Street, at 9:30 a. m.

DAVID E. WEISCHADLE, EdD
Director of Research, Planning,
and Evaluation

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TRENTON PUBLIC SCHOOLS
Trenton, New Jersey

January 12, 1971

To All Principals:

On Thursday, January 21, 1971, at 1:30 P.M. in Washington School, there will be a meeting of <u>elementary</u> principals only.

This meeting has been called to discuss, with Dr. Weischadle, the progress in the Department of Research and Evaluation.

Very truly yours,

William D. Walker

WDW:je

EGB-3--6-70--FD.

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BOARD OF EDUCATION
ADMINISTRATION BUILDING
TRENTON, N. J.

A G E N D A

Elementary School Principals
January 21, 1971
Washington School

1. Introductions

2. Overview of local conditions and development

   Dr. David E. Weischadle
   Trenton Public Schools

3. Strategic Planning and Educational Program Planning Budgeting Systems

   Mr.Edmond H. Weiss
   Government Studies and Systems

4. Questions and Answers

EGB-3-6-70-FD.

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BOARD OF EDUCATION
ADMINISTRATION BUILDING
TRENTON, N. J.

A G E N D A

Central Office Staff
January 25, 1971

1. Introductions

2. Local Development of an Office of Research, Planning, and Evaluation

   Dr. David E. Weischadle
   Trenton Public Schools

3. Strategic Planning and Educational Program Planning Budgeting Systems(EPPBS)

4. Question and answers

SUBJECT: Orientation Sessions, EPPBS

TO: All Administrators & Staff

FROM: Dr. David E. Weischadle

DATE: February 4, 1971

Attached is a brief questionaire designed to gain some knowledge of the effectiveness of the orientation sessions on Educational Program Planning Budgeting System (EPPBS).

Please complete and return to this office as soon as possible. These questionaires will be an important tool in the development of orientation sessions for our elementary and secondary staff to be held this spring.

Your cooperation in this matter and during the orientation sessions is greatly appreciated.

AA
Attachment

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TRENTON PUBLIC SCHOOLS

ORIENTATION PROGRAM - EPPBS

Attended session on January 21, 1971 _____
January 25, 1971 _____
January 29, 1971 _____
Other _____ _____

	Yes	No	Can't Determine
1. Was the presentation concerning the development of the planning office clear?	___	___	___
2. Was it adequate?	___	___	___
3. Was the presentation of an educational Program Planning Budgeting System clear?	___	___	___
4. Was it adequate?	___	___	___
5. Should more sessions of this nature be scheduled?	___	___	___

If yes, when?

Spring 1971_____ Fall 1971_____

6. Would you use the following space to comment about what you heard at these sessions? If you like, please offer any suggestions you may have.

_____

_____

_____

_____

_____

_____

_____

_____

_____

TOP

Participation of the General Community In Trenton's Strategic Planning System: Some Possibilities

Trenton EPPBS Project
Working Paper #2
December, 1970

160

The Communities Role in Strategic Planning

Developing activities for the community in strategic planning is not so complex or controversial a problem as other problems of community involvement in the schools. The activities proposed for participation in the strategic planning process will not be the only activities in which the community engages, but this project is concerned only with that limited set of community activities that affects the development of strategic plans. This point needs to be made at the outset; there are a great many compelling concerns about the community's role in education, and a number of politically volatile problems, but it is not the purpose of this project to address that broad range. In developing a specific set of tasks and objectives for community participation in planning, we should keep in mind that these are not a limitation on other community activities, developed in other contexts, to serve other ends.

Strategic planning, recall, is the process of setting multi-year objectives for the district, and developing ways of allocating the resources of the district so that they are most likely to achieve those objectives. Strategic planning is only marginally concerned with school district management and operations. Thus, the community's role in the management and operations of the district is of only marginal concern in this project (while it may be the central concern of other projects).

Generally, the community impacts on three elements in the planning process. These three elements are

1. Recommending desired levels of effectiveness for the schools (on a multi-year basis)

2. Evaluating certain aspects of the current educational program

3. Suggesting new projects and activities for the district to implement

The first of these - recommending desired levels - is most important, because, first, the community is entitled to do this in our form of government, and, second, because the community is the main source of such recommendations; in strategic planning, the development of goals is the most important process, and, thus, the community's role is central.

The second and third activities are important, but they are less important to the community. Program evaluation and project design are technical activities; they require specialized skills and considerable factual data. Put in another way, there is no such thing as a "right" or "wrong" goal; the opinions and values of the goal setters are the only criterion of rightness. Program evaluation and project design, however, require the ability to analyze and intepret data. Thus, the community's perceptions in these areas will be among several inputs, and probably will not have the weight of the goal-setting task.

The Corporate Analogy

It is helpful, in discussing this process, to make an analogy between the Trenton School System and a large corporation. Think of the Board as the Board of Directors, the Administration and Supervisory Staff as Senior and Middle Management, the Teachers as the Technical and Operational Staff, and the Students as Clients. Policy and strategic planning is the job of the Board and Senior Management. Implementation of policies and plans is the responsibility of Management and staff. Effectiveness

of the organization is determined by dealings with clients.

The community's role in this analogy is that of Stockholders. The stockholders must be satisfied that the plans, implementation, and effectiveness of the corporation are what they want, or they will withdraw their support from the Board, Management - indeed they may withdraw their support from the entire corporation.

At this point, the analogy is in some trouble. Until something like a "voucher system" is available, the community cannot really withdraw its support from the public schools. But, short of this final measure, they can express their approval or disapproval by the ballot box (Municipal Officials and Bond Issues), through demonstration and dissent, by moving away from the schools, or, what may be most destructive, by indifference to the schools and their needs.

In the case of the corporation, the main criterion employed by the stockholders is <u>profit</u>. In order for the corporate analogy to be useful in educational planning we need something comparable to profit - some kind of measurable output or effects of the school system that are valuable to the community - stockholders.

<u>Generating Goals</u>

The community, then, must communicate to the Board and Management of the schools, <u>what kinds of effects they consider valuable</u> (or profitable)

and how much of those effects or profits they feel they are entitled to have.

Goals should be expressible in quantities. To achieve this end, indicator scales are used, which define the kind of profits judged appropriate. A community defines its own philosophy by, first, saying what these indicators should be, and what level the schools should achieve. If, for example, a community believes the "reading ability" is a desirable effect of education, it may create an indicator such as

"Per cent of student body reading at or above grade level."

If in a given year, only 35% of the students read at or above grade level, the community may generate as a goal that 60% which will achieve that level by the end of five years. If in that same community "going to college" is a valuable effect, they might set as a goal the raising of college placement from 25% to 50% in the five year period. And, because a community will probably have several goals, it also needs to indicate the priorities of importance of the various goals.

Who is the Community, and How Does it Generate Goals?

The community, as conceived of here, is the entire adult population of the City of Trenton, rather than some particular ethnic or socioeconomic group. Although information from the community will probably be grouped according to socioeconomic categories, it is essential that, at an early stage in the planning process, the Board receives a report which is, in

fact, a summary of the preferences and perceptions of the total community - rather than what some person or small group claims to be the opinions of the community. The Board needs to know how widely or narrowly felt are certain opinions. Goals must be developed from a vote of sorts, with a universal franchise for voters. How can such a report be generated?

It probably cannot be developed without a survey of a sample of the community - - - a survey based on legitimate sampling procedures, and designed in accordance with good social science. While it is true that survey data is frequently lacking in rich detail or personal insights from the respondents, we should remember that the goal of this particular survey is to frame broad, organization-wide objectives for the Trenton schools, not to learn in detail any particular individual's ideas. As indicated earlier, there are other occasions when detailed personal interviews are valuable to education, but they are not really essential to the strategic planning process.

The Two Stages of Survey Implementation

Eventually, the survey of community preferences should be an annual activity of the Research, Planning, and Evaluation group. Before that level can be achieved, that is, before the survey procedure can be clarified and formalized, there will need to be two stages of development.

Stage I, Spring of 1971, will be a less structured procedure, for many reasons. First, we do not yet know what Indicators to ask about, and one of our goals will be to find out what they are. Second, it is hard to talk

about "levels of desired effectiveness" because we do not yet have an information system to support the planning system, and, consequently, we do not know what the current levels really are. As a result, Stage I data will be less structured and require more analysis from the project team. The goal will be to ascertain, from a representative sample of the community:

- the kinds of educational effects that are valued by the citizens
- whether certain effects should be changed or improved
- what the priority of needs is perceived to be

The summary of the report will contain descriptions of what the community's indicators of quality are, which ones need changing over five years, and the felt priorities for the changes.

Between Stage I and Stage II, the community generated indicators will become the basis of planning information files. If the community is interested in drop-out rate, reading levels, drug abuse, discipline, vocational preparation - there will have to be factual data gathered to ascertain the current levels of effectiveness on those indicators.

Thus, in year two, the community members surveyed will be told the actual levels on those indicators judged important by the community, and asked to say what the desired levels should be, or, at the very least, which ones ought to be changed. The survey process, thus, will become

increasingly formalized, the kinds of responses more structured, and the analysis more mechanical and less intellectual (thus, less expensive).

Evaluation and Project Design

After the survey data is analyzed, the community again will have an opportunity to participate, this time in the form of existing or newly created groups, to work in concert with the educational staff on the priority needs identified in the survey. This is the reverse of the process ordinarily followed, wherein groups are formed to tackle problems before anyone has determined, objectively, how important the problem is to the community.

In the Trenton PPB System, after goals and priorities have been assessed, then citizen committees will be appointed to analyze and evaluate current practices, and design alternative means for correcting the problems and reaching the goals.

Procedural Questions

It is important that this community-involvement process be approved at the conceptual level, before specific survey means are considered. The Technical Task Force is invited to review this general proposal, and, if ultimately approved by the Task Force and Administration, then, the Task Force will be given an opportunity to review specific survey instruments and procedures.

If there are any alternative means of getting representative data about community goals and opinions, they will be considered as well.

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Community Goals Ballot

Preliminary Draft

169

February, 1971

Question 1

Please read the following list and put an "X" next to the five items that, in your opinion, most need improving in the Trenton Schools.

Drop-out rate	___
Guidance and Counseling	___
Safety and Security	___
Activities and Services for Adults	___
Libraries	___
Food Services	___
Opportunities for Handicapped Children	___
Drug Education	___
School Buildings and Facilities	___
Teacher Attitudes	___
Recreation and Sports	___
Basic Skills	___
Discipline	___
Preparation for College	___
Reading Ability	___
Class Size	___
Opportunities for Pre-School Children	___
Career Opportunities for Members of the Community	___
Community Participation	___
Citizenship and Social Studies	___
Student Health	___

Question 1 (continued)

Opportunities for Disadvantaged Students ____

Teacher Turnover Rate ____

Salaries ____

Equipment and Materials ____

Sex and Family Education ____

Consumer Education ____

Extra Curricular Activities for Students ____

Math-Science Education ____

Use of Money ____

Opportunities for Spanish-Speaking Students ____

Communication with Parents and Community ____

Relationships among Students ____

Attendance ____

Selection of Teachers ____

Student Preparation for Jobs ____

Relations among Students with Different Racial or Cultural Backgrounds ____

Question 2

Please read the following list and put an "X" next to the five items, that, in your opinion, are the best things about the Trenton Public Schools.

Drop-out rate ____

Guidance and Counseling ____

Safety and Security ____

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Question 2 (continued)

Activities and Services for Adults	____
Libraries	____
Food Services	____
Opportunities for Handicapped Children	____
Drug Education	____
School Buildings and Facilities.	____
Teacher Attitudes	____
Recreation and Sports	____
Basic Skills	____
Discipline	____
Preparation for College	____
Reading Ability	____
Class Size	____
Opportunities for Pre-School Children	____
Career Opportunities for Members of the Community	____
Community Participation	____
Citizenship and Social Studies	____
Student Health	____
Opportunities for Disadvantaged Students	____
Teacher Turnover Rate	____
Salaries	____
Equipment and Materials	____
Sex and Family Education	____
Consumer Education	____
Extra Curricular Activities for Students	____
Math-Science Education	____
Use of Money	____

Question 2 (continued)

Opportunities for Spanish-Speaking Students ____

Communication with Parents and Community ____

Relationships among Students ____

Attendance ____

Selection of Teachers ____

Student Preparation for Jobs ____

Relations among Students with Different racial or Cultural Backgrounds ____

Question 3

Please put an "X" next to the two items that, in your opinion, are the most serious problems for people living in Trenton.

Safety and Crime ____

Taxes ____

Health Care ____

Environment and Pollution ____

Housing ____

Transportation ____

Employment ____

Education ____

Recreation ____

Other (specify) _____ ____

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Question 4

Please put a circle around yes or no for each of the Following questions.

Are you a parent?	Yes	No
Do you have school-age children?	Yes	No
Do you have children in the Trenton Public Schools, but not in any other schools?	Yes	No
Do you have children in private or parochial schools, but not the public schools?	Yes	No
Do you have children in both the public and non-public schools?	Yes	No

---

Question 5

Put an "X" next to the term that best describes the Trenton neighborhood in which you live.

_____

_____

_____

_____

_____

Question 6

What is your sex? (circle one) Male Female

What is your age? _____ years old

Question 7

ANSWER THE FOLLOWING QUESTIONS, ONLY IF YOU WANT TO.

Is your race (circle one) White Black Other?

What was your family income in 1970 _____?

Does your family receive welfare or public aid - Yes No?

Question 8

If you could give one piece of advice to the Trenton Superintendent of Schools, what would it be?

_____

_____

_____

_____

Please return this form, before March 26, to

_____

_____

_____

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Trenton Public Schools
Trenton, New Jersey

OFFICE OF THE SUPERINTENDENT

SUBJECT: Trenton Community Opinionnaire

TO: All Staff Members

In an effort to reach all interested and concerned citizens of the city of Trenton, we have developed a "Community Opinionnaire." By completing this opinionnaire, the citizens can express their feelings about various aspects of the public schools.

Shortly after the distribution of the opinionnaire to the community, the same opinionnaire will be available for your completion. You will have the same opportunity to express your feelings concerning the various aspects of our schools.

The opinionnaire was developed by representatives of local, state, and national agencies and organizations. Included were representatives from the local teacher professional groups and the anti-poverty agencies.

I am asking you to distribute this opinionnaire to your students and encourage its return. Ask that the parent complete it as soon as possible and return before school closes on Friday, April 2. When you receive an opinionnaire from a student, simply deposit it in the principal's office.

Your assistance in the distribution and collection of the opinionnaire will enable increased returns. The time involved in doing so is minimal in terms of what the results could be.

If you have any questions, please contact your building principal.

Sincerely,

Ercell I. Watson

Ercell I. Watson

Trenton Public Schools
Trenton, New Jersey

OFFICE OF THE SUPERINTENDENT

SUBJECT: Trenton Community Opinionnaire

TO: All Staff Members

As the community is being asked to assist in developing some priorities, I am also asking that each staff member offer his opinions concerning the issues contained on the opinionnaire. When you have completed the opinionnaire, please deposit it in your principal's office in the receptacle provided.

Your opinion as a teacher will be combined with those of your other staff members to form a separate segment of this overall survey. It is, therefore, important that you insure that your opinionnaire is not mixed with those of the community. You can insure that this does not happen by using the proper receptacle in the principal's office. You can also insure that this will not happen by writing "staff" at the top of the opinionnaire.

Answer as many questions on the opinionnaire as you can. If they are not applicable, leave blank. For example, if you are not a resident of Trenton do not complete those sections.

I am looking forward to a good response in order to gather some kind of understanding of how both the community and staff feels about our educational program.

Sincerely,

Ercell I. Watson

Ercell I. Watson

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BOARD OF EDUCATION
ADMINISTRATION BUILDING
TRENTON, N. J.

March 25, 1971

- Press Release -

Beginning March 28, 1971, Trenton Public Schools will conduct a census of interested citizens and their opinions about various aspects of the public schools. Citizens will be asked to rate such items as current programs in adult education, drug abuse, consumer education, and traditional school subjects.

Also included will be items such as class size, teacher ability, staff attitude, and discipline. The citizens of Trenton will also be asked to rate public education in terms of other priorities of the city, for example, taxes, housing, crime and transportation.

Dr. Ercell I. Watson, Superintendent of Schools, pointed out that this effort is perhaps the first time in New Jersey, and the entire nation that a public school has gone to its citizens in this way. By distributing a questionnaire, call "Trenton Community Opinionnaire", the school system hopes to provide an opportunity for each citizen to express his feeling in privacy and in a convenient place - his own home.

Even the method of distribution marks the process as innovation. The opinionnaire will be printed in the two local newspapers, the Trenton Times-Advertiser and the Trentonian, thus reaching all those who can purchase or acquire a newspaper. Distribution will be increased by making Opiniomnaires available at each public school and by sending one home with each student.

The Opinionnaire was developed through extensive review by a wide variety of groups and organizations. Their activities were guided by the new planning office of Trenton Public Schools, directed by Dr. David E. Weischadle. Dr. Weischadle explained that an unusually high rate of input by professional groups and organizations was needed to develop the best possible instrument to conduct such a survey.

Included in the Task Force developing the opinionnaire were representatives from local staff, Trenton Education Association, Trenton Federation of Teachers, and Administrators and Supervisory Association, N.J. Department of Community Affairs, Model Cities and United Progress Incorporated, the city's anti poverty agencies, N.J. Urban Schools Development Council, and Research for Better Schools of Philadelphia.

Handling the technical details such as key punching, coding, and tabulating is Government Studies and Systems (GSS) of Philadelphia. GSS is contracted under a Title III, ESEA grant to assist the Trenton School System set up a comprehensive planning system using an Educational Program Planning Budgeting System (EPPBS). Directing their effort for GSS is Mr. Edmond Weiss.

In addition to providing an opportunity to rate specific aspects of the schools, the citizens will also have the chance to express themselves an any other aspect of the schools as well. Specifically, they are asked: "If you could give one piece of advice to the Trenton Board of Education, what would it be?"

The results of the survey hope to be available by the end of the school year. They will become another input to the development of priorities and new programs to meet local goals. The volume of Opinionnaire's return will also be an important measure of interest. Most

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important, the entire effort is a measure taken to keep informed about what interested citizens feel about their schools.

(For more information contact the Trenton Public Schools, Office of the Superintendent, Trenton Public Schools, Trenton, New Jersey)

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Trenton Community Opinionnaire

INSTRUCTIONS

PLEASE READ INSTRUCTION CAREFULLY

We are asking the citizens of Trenton to assist us in developing some priorities for the coming year. Your answers to this opinionnaire will help us in developing better educational programs for your children. Be as frank as you wish. YOU NEED NOT SIGN THE OPINIONNAIRE. Please answer all questions.

Any person, 18 years or older, who lives in the city of Trenton, is entitled to complete the opinionnaire. Please complete each form on an individual basis. Each member of the family should complete his own opinionnaire.

HOW TO RETURN YOUR OPINIONNAIRE

When you have completed filling out the opinionnaire you may return it in one of the three following ways:

1. Have your youngster return it to the school he or she attends.
2. Return the opinionnaire personally to any public school building in the city.
3. Mail the opinionnaire to---

Board of Education
9 South Stockton Street
Trenton, New Jersey 08609

Question #1

In this question, we are asking you to rate the following aspects of the Trenton Public Schools as being very good, good, average, bad, or very bad. If you have no opinion about the item, use that category description. Circle the number under the category of your rating.

	Very Good	Good	Average	Bad	Very Bad	No Opinion
Percentage of Students who Graduate	5	4	3	2	1	0
Guidance and Counseling	5	4	3	2	1	0
Safety and Security	5	4	3	2	1	0
Adult Education	5	4	3	2	1	0
School Libraries	5	4	3	2	1	0
School Lunch Programs	5	4	3	2	1	0
Learning Opportunities for Handicapped Children	5	4	3	2	1	0
Drug Education	5	4	3	2	1	0
School Buildings	5	4	3	2	1	0
Staff Attitudes	5	4	3	2	1	0
Recreation and Sports	5	4	3	2	1	0
Basic Skills Education	5	4	3	2	1	0
Discipline	5	4	3	2	1	0
Preparation for College	5	4	3	2	1	0
Reading and Language Arts	5	4	3	2	1	0
Class Size	5	4	3	2	1	0
Learning Opportunities for Pre-School Children	5	4	3	2	1	0
Job Opportunities for Members of the Community	5	4	3	2	1	0
Opportunities for Community Participation	5	4	3	2	1	0
Citizenship and Social Studies Instruction	5	4	3	2	1	0
Student Health Services	5	4	3	2	1	0
Evening High School	5	4	3	2	1	0
Vocational Education	5	4	3	2	1	0
Learning Opportunities for Disadvantaged Children	5	4	3	2	1	0
Books, Supplies, Materials	5	4	3	2	1	0
Sex and Family Education	5	4	3	2	1	0
Consumer Education	5	4	3	2	1	0
Extra Curricular Activities for Students	5	4	3	2	1	0
Math-Science Education	5	4	3	2	1	0
The Way the District uses Money	5	4	3	2	1	0
Learning Opportunities for Spanish-speaking Children	5	4	3	2	1	0
Communication With Parents and Community	5	4	3	2	1	0
Attendence Levels	5	4	3	2	1	0
Teacher Ability	5	4	3	2	1	0
Student Preparation for Jobs	5	4	3	2	1	0
Relations among Students with Different Racial or Cultural Backgrounds	5	4	3	2	1	0

Question #2

What, in your opinion, are the two most serious concerns of people living in the City of Trenton? Put an "X" in the box next to the two most important concerns.

- ☐ Safety and Crime
- ☐ Taxes
- ☐ Health Care
- ☐ Environment and Pollution
- ☐ Housing
- ☐ Transportation
- ☐ Employment
- ☐ Education
- ☐ Recreation
- Other (specify)_____

Question #3

Are you a parent? (circle one) Yes No

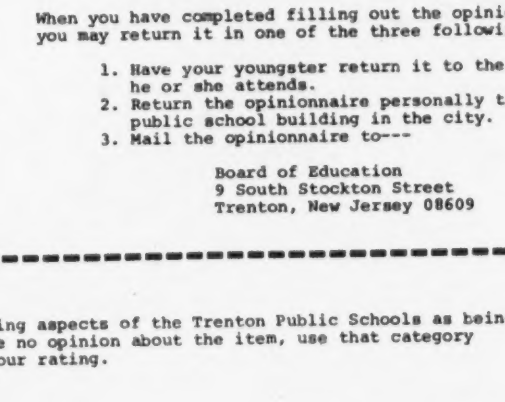
Do you have school age children? (circle one) Yes No

Write below the number of children who attend-

Trenton Public Schools ___

Private or Parochial Schools ___

Question #4



Look at this map of Trenton, and write the letter that represents the part of the city you live in. ☐

NOTE: STREETS SHOWN ABOVE ARE USED AS BOUNDARY LINES AND ARE NOT DRAWN TO SCALE.

A-Ferry Area
B-South Trenton
C-Chambersburg
D-Lalor Tract
E-Villa Park
F-Wilbur-Walnut Area
G-East Trenton
H-Coalport-Clinton Street Area
I-North Trenton
J-Junior High 1 Area
K-Battle Monument Area
L-Spring-Passaic Area
M-Perry Street Area
N-Mercer-Jackson Area
O-Reservoir Area
P-Hiltonia Area
Q-Glen Afton Area
R-Stuyvesant Area
S-Cadwalader Area

Question #5

What is your sex? Male Female

What is your age? ___years old

Question #6

If you could give one piece of advice to the Trenton Board of Education, what would it be?

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PLEASE RETURN BY APRIL 2, 1971

FALL 1970

Volume 50, Number 3

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Illinois Schools Journal

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Proposes Individualization of School's Curriculum

DAVID E. WEISCHADLE

A Change in Direction

Each year American public schools are faced with the difficult task of presenting a varied, viable, and effective educational program for millions of students. Since the beginning of the twentieth century, commissions, committees, and congresses have met to discuss and write programs they feel will serve America's youth best.[1] Other groups have gathered to decide how best to organize and teach the various disciplines in the schools.

While such study and research has been monumental, the grave responsibility for developing curricular programs still remains with the local school system which must study, experiment, and adopt its own curriculum—a curriculum which is sufficiently flexible to meet the needs of both today's and tomorrow's youth. To accomplish this task, some permanent continuous organization, whose single purpose is curriculum revision, must be developed in local school systems. In this development, a clear improvement over the present approach, one which favors emphasizing subject matter rather than the student, is needed.

"We know what's best for the student!" Surely this statement was

[1]Examples are: Commission of the Reorganization of Secondary Education, *Cardinal Principles of Secondary Education* (Washington, D.C.: United States Office of *Education for ALL American Youth* (Washington, D.C.: National Education Association, 1944, revised 1951); and Report of the Harvard Committee, *General Education in a Free Society* (Cambridge, Massachusetts: Harvard University Press, 1958).

originally made by Adam and Eve to friends while discussing their youngsters. And just as surely, the same statement was probably made last week by someone with as much sincerity and determination as Adam.

The average high school curriculum today reflects this thinking. The experts, in most cases well prepared in their subject fields and carefully selected by those in charge, establish rigid programs to be followed by the student who has expressed a particular vocational goal. For example, the business educators develop a series of courses to be taken over a three to four year stretch. The student is allowed a few electives, courses he may select according to his o[illegible] interests. Unfortunately, such courses often come late in his program and are too few in number to be of any great value to him. The result is a total program that has little intrinsic value for the student. With courses established on a "need-to-know" basis by the educator, it is left for the classroom teacher to spark an interest in the student for the courses he is taking. The why of such courses is generally not a subject of discussion for students. John I. Goodlad points out: "There is an unwillingness or an inability (or both) to state—at any level of responsibility or authority—what purpose is to be served by education, schools, or specific programs of instruction!"[2]

To improve the programs of study, the subject experts need not leave the scene. On the contrary, they are important and necessary forces in curricular development; however, they are not the only forces. Their role is important, but not singularly important. Others clearly need to be involved in some practical and meaningful way.

One solution may well be a curriculum committee composed of members of the system's student body, community, and professional staff. Unlike the board of education, the committee's responsibility would include only the curricular programs, leaving administrative and business matters to the managers. This curriculum committee would be comprised of young people and adults, businessmen and laborers, the well-to-do and the poor. Its composition and size would vary according to the make-up and size of the community which the schools serve. The goal of the committee would be the development of an effective program of instruction including all activities for the student whether classroom or "extra-classroom" in nature.

To accomplish worthwhile curriculum improvement and to maintain change, a curriculum committee must include three groups.

[2] "The Educational Program to 1980 and Beyond," *Designing Education for the Future*, vol. II, edited by Edgar L. Morphet and Charles O. Ryan (Denver, Colorado: Citation Press, 1967), p. 47.

Students. Though often ignored, the student body of the school system is in the best possible position to know what the student needs. It is unlikely that students will develop on their own a course of study. Their ideas and thoughts need the knowledge and experience of adults who can apply these raw data to the development of succinct and meaningful educational programs. Realistically, it means that educators must begin listening to students—not just to those students who are willing to accept programs designed by professionals for students but also to those students who feel that today's programs have little meaning for them. No longer will high grades and teacher recommendations determine who student leaders are. Interest in school affairs and student support will.

Citizens. Responsible citizens from all fields—industry, labor, service groups, and the professions to mention only a few areas—can bring to the committee understanding of the community and insights into the needs of the people living there. Such people will have direct knowledge of work and social conditions. It is such representation that the committee needs in order to reflect the social setting that the schools serve. In addition, such representation means that the community has become a part of the school—that members of the community are involved in developing a program of study for their children which is both meaningful and valuable.

Professional Staff Members. Teachers and other staff members bring to the committee valuable experience in the classroom. They have the knowledge of teaching strategies which are successful now and those that will be successful in the future. At the same time, they are able to utilize the professional education and training they may have in special areas, e.g., curriculum, subject fields, and administration. Many may have had experience in business, military, and other fields. Their participation also provides them with a significant voice in change—change which they must implement in the classroom.

To aid the committee, consultants and specialists in curriculum, subject fields, and learning should be available. In larger school systems, full-time consultants should be employed to work on specific areas for the committee. As consultants who have a knowledge of what is taking place in other school systems, they can advise on new trends and approaches, thus preventing programs from being too narrow and colloquial.

Much preparation is needed in developing such a committee. An effective committee may well take as much as two to three years to organize and to function smoothly. Most certainly it is not an overnight creation. An early consideration is membership. Ideally, members would be elected; however, it is likely that the first members would be

appointed or selected, with succeeding members elected. Similarly, the committee would begin with limited duties and powers. With time and experience, the committee would gain additional responsibilities. The development would vary with each system initiating such a committee. Of primary importance is long-range planning, careful evaluation of each step in the development, and a realistic understanding of problem areas that will arise.

In many schools curriculum committees must change large segments of the school programs. They must effect an educational revolution. Significantly, in all effective social, economic, and political revolutions, change has been effected from within. Though able to spark change, foreign ideas have always had to have local acceptance and enthusiasm sufficient to enlist total or near total support of the populace. It follows that the same will be true of educational change, namely, that it must truly involve the students, community, and professional staff. These groups form the local populace in education which must organize the change that is to take place.

A few teachers writing new courses of study in subject fields is not curriculum change, just curriculum adjustment. It is both piecemeal and inefficient. A system-wide approach involving all levels of instruction, subject fields, and student activities is needed to produce a unified, comprehensive program. Such a program needs intrinsically motivated individuals who wish to produce the best possible learning activities for students. A committee of students from the schools, individuals from the community, and teachers from the staff seem best qualified to produce such a curriculum.

Once a curriculum committee has been formed, the school system has a forum from which to initiate change for the student. Such change would result in many unique school programs throughout the nation, state, and even the local school systems. These curricula would be as unique and varied as the students and communities which they serve. But school programs cannot be designed to perpetuate the community's economic, social, and cultural state. School programs must be designed to change behavior patterns; however, it is necessary to begin at the level of the student attending. Current needs must be met before improvement can even be expected.

For too many years curricula have been designed for all students entering the schools. It is quite impossible to achieve such a goal. A change in direction is required, i.e., a change from a curriculum for all students to a curriculum for each student. To achieve this goal, it is necessary to provide a broad range of courses organized according to student needs and interests. Devising such a course of study poses a great challenge for both the school and the student. Each has a signifi-

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cant responsibility. The student must have enough interest in his future to effectively plan for it while the school must have enough foresight to inform him of his opportunities. The task is not simply that of the secondary school. The challenge affects the whole system at all instructional levels. One possible approach follows:

Ages 4-10	Socialization of child, basic skills such as reading, and beginning of self-conceptualizing.
Ages 11-13	Remedial work, general education, self-conceptualization, and exploratory courses.
Ages 14 and above	Self-conceptualization, reinforcement and utilization of general education, work and study programs.

Under such an arrangement, the youth of high school age spends his school day learning about himself and his role in society. A means to this end is actual application of his knowledge to real life situations in work, public service, or study programs. Activities like these would decrease "the contrast between the way most people outside the schools use their time and arbitrary use of time forced on students—who spend each unvarying school day learning subjects assigned one hour each. . . ."[3]

Many ingenious plans have been developed to change the school day.[4] Longer days, shorter periods, large and small class meetings, all woven around very much the same thinking that has created the current lockstep method, i.e., how can we manage to organize the school day in terms of number of students, availability and efficient use of teachers, and utilization of modern educational hardware. Each is an important consideration in educating America's young. Each is a reality that must be tackled. However, the most immediate question that must be answered is whether any one, or all, of these organizational innovations can produce a change in the classroom strategies of the teacher. It is obvious that student management and student education are two different and separate considerations. Now that computers and programmers are available, the schools can develop student

[3] Clayton Braddock, "Changing Times Are Changing Schools," *Southern Education Report*, III (October 1967), 24.

[4] See Robert N. Bush and Dwight W. Allen, *A New Design for High School Education* (New York: McGraw-Hill, 1964); J. Lloyd Trump, *Images of the Future* (Washington, D.C.: National Education Association, 1959); and J. Lloyd Trump and Dorsey Baynham, *Guide to Better Schools* (Chicago: Rand-McNally, 1961).

schedules and class lengths that are very different and far beyond those that the human mind had time or memory power to arrange. If this is so, and apparently it is, then the first order of business is to devise an instructional program that involves strategies in the classroom aimed at improving student learning. With such a curriculum developed, it is then reasonable to worry about organizational problems.

With computers and programmers to develop schedules, many of the other functional devices in the schools can be eliminated, particularly, academic and vocational tracks. For years, students have found themselves in vocational programs or academic courses while wanting to take some other one. Trapped in a track, primarily due to a decision he made two years ago, he usually has to last it out until graduation or quit school. As in real life, it must be possible for the student to change his mind and adopt a new course of study. Somehow, the schools must stay as flexible as the student, and the student must stay as flexible as the world in which he lives. Perhaps an oversimplified solution would be to center the school on learning rather than on academic departments, rigid subject fields, and neatly divided courses; to center the schools on how to learn rather than on achievement tests, grades and grade levels, and covering so much material. The key word here is an overused word, priorities. Which are the urgent problems that need attention immediately? Around which problems do all the others revolve? Far too much time has already been spent on inventive gadgetry. Computers, programmers, and other pieces of hardware must become just another tool of the educator, not his determinant. He must never lose sight of the importance of innovative instructional strategies in his search for innovative school organizational plans.

Another area for study by the curriculum committee is the role of the teacher. With changes in school programs, the roles of the professional staff, particularly that of the classroom teacher, face significant change. Little is achieved by reform in the schools if the same teaching methods and techniques continue in the classroom. Long the classroom dictator of what is to be taught, the teacher must now become a classroom leader—one who stimulates ideas, guides activities, encourages participation, and evaluates progress. His role then is to help students improve and learn from the level at which they find themselves. His role extends beyond the classroom and follows the student wherever his curiosity takes him. The teacher is no longer a subject matter expert; he becomes a learning expert, one who is attuned to the way all learning takes place. Such a role change is not an easy one and involves careful study and a program of reeducation for many teachers. While staff participation in curriculum revision insures support, it does not insure implementation in the classroom.

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Innovations and new approaches are all a part of tomorrow's educational system. Many are even becoming a reality of today. But what innovations and approaches are truly worthwhile and useful for the students in any particular system? How can the system be sure that any new idea is of value to the students? Answers to these questions must vary according to the schools involved. Whatever change does take place must truly involve the entire school system: students, citizens, and professional staff. Effective curriculum change cannot be achieved by mandate or machine; it must incorporate widespread participation at all levels of development.

A Committee at Work. One of the most difficult stages of curriculum committee development is the establishment of a method of operation. How can it organize itself to study new curricular programs? How does a committee of students, citizens, and professionals reach a consensus about new ideas and approaches? How does a committee synthesize all the ideas and information into an effective and unified curriculum? Many of these answers lie in investigation and experimentation with the results being plied by the committee in full session.

Many new curricular programs have come from the millions of dollars invested in research. It is highly unlikely that any one program meets all the needs of any one system in the United States. It is likely that segments of these programs, adapted by the local system, would improve a phase of the school program. How does the committee determine which segments have value and which have none? Much research is needed to determine an outcome of this nature, but such research offers a realistic and worthwhile opportunity for the professional staff of the entire system to assist the committee. As experts in learning and instructional processes as well as in subject matter areas, staff members can tackle this difficult assignment in subcommittees designed to study specific areas. Of importance here is that the curriculum committee has available for its use experts from all instructional levels and subject matter areas who have the theoretical and practical background to study and evaluate such programs effectively.

To assist itself and the subcommittees operating under it, the curriculum committee may want to use consultants who have special knowledge or experience in certain problem areas, e.g., reading, special education, and vocational education. On some questions, the committee may well need "expert advice" to reach a solution; however, such advice must meet critical appraisal. While the use of consultants is highly beneficial, the curriculum committee must maintain control of the direction that curriculum will take. Its unique responsibility mandates that it test new ideas and approaches to the criteria of its goals, the most

important of which is the satisfaction of the needs of the community's students. All recommendations must stand the test of this requirement. On such issues, the committee must establish early a philosophy of education and, more important, a practical, workable approach to achieving its goals.

Too many schools in the nation have confused rapid change with effective change. In a desire to utilize something new and different, whole packages of curriculum have been instituted in schools without prior testing and experimentation. Thousands of dollars have been invested in material and time needed for such change. Were these programs and monies wisely adopted and spent? It is hoped that they were. However, to insure that future adoption is wise, curriculum committees must adopt experimentation as a mode. Only through actual experimentation can a system be sure that new approaches and materials fit their unique community situation. The establishment of pilot programs utilizing the new curriculum appears as the most effective way of evaluation. Involving single classes or entire school buildings, pilot programs develop data pointedly meaningful for that particular system. Carefully developed pilots can reveal how teachers and students react in the classroom, how materials can be utilized best, and how well learning takes place. Such rigid field tests are clearly needed today with the surge of curriculum research that has hit the market. "Madison Avenue" advertising on many occasions hides serious weaknesses in curriculum packages.

With the implementation of pilot programs, the curriculum committee initiates a spirit in the classroom, a spirit of innovation. Unfortunately, far too many teachers conduct their classes with little desire or interest in trying anything new or different. Their day-to-day activities are much the same as they were last year, the year before, and even the year before that. The result is just barely adequate instruction, only a slight bit better than having no teacher at all. With innovations, the committee must provide incentives to be innovative, new programs must come with encouragements to try them. The teacher who is not innovative must be encouraged; the teacher who is must be recognized and rewarded. Classroom grants directly to teachers, higher salaries for teachers in the classroom, and special positions for expert teachers are possible solutions. Another possibility is community recognition, that is, bringing the teacher and his talents to the community to assist them and recognize him for his special qualities. Special adult education programs are a common example of the teacher going to the community with an unusual talent, e.g., bridge, tennis, art, and travel. Such special programs establish a rapport between the school and the community which exhibits friendship, understanding,

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and cooperation.

It is such an atmosphere that truly needs to exist in the schools today. The value of education, long idolized but only recently realized, has caused many pressure groups to question, criticize, and interfere with education. While their interest is welcomed, their tactics have caused havoc and disruption both in and around the classroom. Where such groups can be shown that the schools are not independent but rather interdependent on the community, perhaps such interference will wane. Community interest and interaction is a reality that the schools must now face. Its initiation can be by the school or by the community. It is now time for the schools to begin to shoulder the burden of initiating that interaction with the community.

Making a Decision. As the flow of curricular programs continues from various sources, the local school systems are faced with the difficulty of sifting it for worthwhile ideas and approaches for its students. Some organization is needed to effectively accomplish this task of researching and evaluating new programs of instruction. A curriculum committee approach, with its unique membership of students, citizens, and professional staff members, offers a sound solution for this important decision-making process.

The proposal that curriculum matters become a concern of the student body and the community is not a challenge welcomed by many educators. Such a proposal challenges both the educator's personal and professional abilities, particularly regarding understanding human nature and handling the dynamics of group behavior. The key to this challenge is leadership development. It rests with the educator to develop himself to the task—to improve his ability to communicate, his sensitivity to community problems, his desire to understand the people with whom he must deal, his knack for unifying the group toward significant goals, his stamina to persist in difficult times, and, more important, his desire to develop the most viable and worthwhile educational program possible for the students.

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ON-SITE EVALUATION REPORT

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TRENTON PUBLIC SCHOOLS
NINE SOUTH STOCKTON STREET
TRENTON, NEW JERSEY 08611

DR. DAVID E. WEISCHADLE
Director of Research and Evaluation

April 2, 1971

Miss Evelyn H. Ogden
Assistant Director
Program Management
Department of Education
Division of Research, Planning, and Evaluation
225 West State Street
Trenton, New Jersey 08625

Dear Miss Ogden:

On March 23, 1971, I received a copy of the project evaluation report, BUILDING A COMPREHENSIVE PLANNING CAPABILITY MODEL WITH EPPBS. Generally, I believe the report to be accurate and very favorable from our standpoint. I would like, however, to respond to several areas that were brought up in a somewhat negative way in the report.

Perhaps, the most significant negative comment made concerned the Trenton Community Opinionnaire. The instrument which the evaluators saw was in its initial draft. That draft was the result of several very long sessions of our Technical Task Force. The instrument, indeed, was very much the design of that group and reflected the kinds of things that they thought should be asked of the community. Since their final session with the opinionnaire, I have met with three consultants from Opinion Research Corporation, Princeton, New Jersey and discussed the opinionnaire. This highly respected opinion gathering firm felt the instrument to be generally suited to the average citizen of the city of Trenton who would complete it. They also provided several suggestions which were incorporated in the final opinionnaire, which will appear in the Trenton newspapers on March 28 and 29 and will also go home with the students.

I also felt that the recommendations made by the evaluators concerning the project evaluation were somewhat unfair in terms of our given situation. The project deals with the public schools and cannot hope to have anything more than side effects on the much larger issue of the city budget.

Lastly, I would like to address myself to the comment which the evaluators made concerning "an over reliance on the opinion of the general public." Once again I feel that the evaluators failed to capture the total concept of our going to the public at this stage. On the tentative evaluation program developed for the project there is indication of a two-phase process, which will later involve community, staff, and student body in development of specific educational programs. This material was furnished to the evaluators but apparently went unread.

In spite of these above comments, I feel that the evaluation report generally reflected the energy and force which is behind this project. It is this spirit which, I think, will not only result in a development of a PPBS in Trenton but will in reality result in an effective PPBS.

Sincerely,

David E. Weischadle

DEW:aa

Enclosure

cc: Dr. Watson
Mr. Maffei
Mr. Weiss

P R O J E C T

E V A L U A T I O N R E P O R T

PROJECT TITLE Building a Comprehensive Planning Capability Model with E.P.P.B.S.

DIRECTOR David Weisschadle

SCHOOL DISTRICT Trenton

****

EVALUATOR(s) Richard J. Comtois

Harold Sager

DATE(s) OF EVALUATION February 26, 1971

NEW JERSEY STATE DEPARTMENT OF EDUCATION
DIVISION OF RESEARCH, PLANNING AND EVALUATION
Branch of Evaluation
Trenton, New Jersey 08625

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I. Project Management

1. Has a complete record system been established and maintained by the project director?
   Yes. A high level of record keeping, e.g. correspondence, meeting minutes, financial has been instituted even to the extent of a daily event log.
2. Does the school administration support the project?
   Yes. The school administration was behind the initial request for this project and continues to support it.
3. Is the school administration informed of the project activities?
   Yes. Dr. Watson has biweekly meetings with the project director, Mr. Maffei is in daily contact with the director.
4. Are project staff informed as to the goals and objectives of the project?
   No staff involved beyond the director.
5. Is the community knowledgeable of the project?
   Articles making reference to the project have appeared in Trenton newspaper. Letters announcing the project have been mailed to 75 organizations.
6. Are the participants informed as to the goals and objectives of the project?
   Orientation programs have been held with Boards & principals; teacher orientation is scheduled. Business Manager has been highly involved in the project.
7. Is the project serving the number of participants in planned to serve?
   The project will serve the City of Trenton as planned.
8. Have consultant services been adequate and effective?
   Yes. GGS services have been instrumental in the progress of the project, to date.
9. Are materials and supplies provided as scheduled?
   Yes.
10. Are all positions filled in the project as scheduled?
    Yes.
11. Have all personnel performed in accordance with job descriptions?
    Yes.

A. Rating of Management Control

Excellent	Good	Fair	Poor
	X		

B. Name and Title of Persons Interviewed

1. Dr. David Weisschadle - Project Director
2. Mr. Edmund Weiss - GSS Consultant
3. Mr. Pasquale Maffei - Assistant Superintendent of Schools
4.
5.

C. Describe the Major Strengths

Modern management techniques are used, e.g. PERT, Gautt chart. Activities well organized & specifically oriented towards short range as well as long-range goals. Records are complete. Project Director is well-liked; has good liason with administratic and Technical Task Force.

D. Describe What are Considered to be Major Weaknesses

No major weaknesses are apparent.

E. Recommendations

None

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II. Activity Performance

1. Are all planned project activities occurring as scheduled?
   Yes.
2. How many activities have been completed to date?
   All activities scheduled (23).
3. What indicators of effectiveness are there available for the completed activities?
   Committees & Task Force have been involved in decision-making. Feedback devices to determine effectiveness of orientations are designed and scheduled for distribution.
4. Have any of the planned activities been omitted, modified or rescheduled?
   Project started 4 months behind schedule. Activities were rescheduled. Milestones are now in-time with original schedule.
5. What factors caused the change?
   Delay in approval of funds.
6. Are there any indicators used as milestones in the ongoing activities?
   Office and facilities have been established. Task Force meetings are underway. Orientation programs have been held.
7. Is there any evidence that training objectives in terms of performance have been carried over into practice?
   Business Manager is developing new techniques required by P.P.B.S. Carryover in administration is premature.
8. Are materials and resources available and utilized by project participants?
   Yes.

A. Rating of Activity Performance

Excellent	Good	Fair	Poor
	X		

B. List Activities Observed

1. None

2.

3.

4.

C. Name and Title of Persons Interviewed

1. James Smith - Elementary & Junior H.S. Principal

2. Tom Cooper - Director of Education - United Progress Inc.

3. John Cooney - Director of Division of Youth, N.J.D.C.A.

4.

5.

D. Describe the Major Strengths

Activities have the quality which provides a strong foundation toward the projects' goals. Orientation programs have been effective, Advisory Council highly involved in project effort.

E. Describe What are Considered to be Major Weaknesses

Instrument that was designed for the eitizenry and educators to determine educational priorities and problem areas is poorly designed. Technical terminology & length make it ineffective for average Trenton citizens is one obvious fault. Other faults can be pinpointed.

F. Recommendations

1) Consider adopting a personal interviews method with a stratified random sample of the entire community.

2) Consider consulting with personnel in Model Cities, U.S.D.C., or E.I.C. who have developed & demonstrated expertise in designing survey instruments for use in Urban Areas.

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III. Project Evaluation

1. Does the Project have a plan for evaluation?
   As stated in the proposal, final evaluation will be based on whether PPBS is operational after year 3 and whether a community survey indicates a degree of effectiveness.
2. Is there an evaluation design completed for the project?
   The evaluation methods stated in the proposal do not involve project staff.
3. Is the evaluation design adequate to measure the goals as stated?
   The observation of the fact that a PPBS system has been implemented is an adequate measure of the project goals stated in the proposal.
4. Are there adequate monitoring procedures for unintended consequences?
   The Director is in a position to monitor endogenous and exogenous developments.
5. Has a system of data gathering been established for evaluation?
   a. instrument design
   b. adequate instruction to user for implementation
   c. documentation
   e. Reliability and validity checks established

   Not applicable as per above comments.
6. Is data being collected?
   Data collection is planned as a future activity.
7. Is evaluative data available on completed activities?
   Completed activities have been documented.
8. Is evaluative information being used for decision-making concerning future activities?
   The evaluation information will not be produced until the end of the 3rd project year.
9. Are evaluation reports being written and disseminated?
   No - reasons same as above.

A. Rating of Project Evaluation

Excellent	Good	Fair	Poor
		X	

(Relative to goals stated in proposal)

B. Name and Title of Persons Interviewed

1. Dr. David Weissehadle - Project Director
2. Mr. Edmund Weiss - GSS Consultant
3.
4.
5.

C. Describe the Major Strengths

D. Describe What are Considered to be Major Weaknesses

E. Recommendations Goals stated in proposal require only that a PPBS system is implemented. The writers of this evaluation feel that the stated goals should include a measure of quality. It is also felt that an Urban P.P.B.S., pilot should have goals that include the improvement in student accomplishments which are directly attributed to a reallocation of recources resulting from P.P.B.S. operations. A comment received & assumed reliable is is that the Trenton Education budget is at a level at which the education system can barely survive, and without extra-city funding, e.g. Bademan legislation, Title III projects, there is no budgeting flexibility. Therefore, in urban areas where educational budgets tned to be insufficient, P.P.B.S. should be applied to the total government budget rather than just Education. We agree that this plan may deal education more funds. P.P.B.S. is a fine idea, but Trenton's tight-money situation may not reflect it's merits

V. Project Goals

Projects may have a single goal or several goals which may or may not be related. The evaluator is to determine the extent to which the goal/s are being reached.

1. Are the goals of the project understood by all participants?
2. Are the project activities related to goal achievement?
3. Has the project achieved targeted goals as scheduled?
4. Have new goals been established or original goals modified as a result of project activities?

A. Rating of Probability of Goal Achievemert

GOALS	WILL BE ACHIEVED	SOME DOUBT	DOUBTFUL	SERIOUS DOUBT	GRAVE DOUBT
1					
2					
3					
4					
5					

Some Doubt - High probability of achievement with more effort
Doubtful - 50/50 probability - might be modified in time or scope
Serious Doubt - Too much catch-up necessary - modifications are required
Grave Doubt - Cannot possibily be achieved - problems are of such magnitude that they cannot be resolved in time remaining

B. Comments - (Support with recommendations all categories of doubt)

VI. Summary

A. Councils

1. Is there an advisory council or councils for the project?

[X] YES [ ] NO

2. The number of persons on the council: Approximately 15

3. Describe the composition of the council. (Whom do the members represent?)

Wide representation from among institutions and agencies in Trenton.

4. What functions do the council perform? (Are council write-offs necessary in decision-making?)

Advisory

B. Budget Information

1. Is the budget realistic for the scope of the project?

[X] YES [ ] NO

2. Is a surplus anticipated in the budget?

[X] YES [ ] NO

a. Why? Secretarial position is part-time.

3. Will cost encourage or discourage diffusion?

Definitely encourage.

4. Comments:

C. Priority Impact

The State Advisory Council has set priority areas for project impact. Evaluators have been assigned projects with similar target populations and have the opportunity to make comparisons. In this section the evaluator is requested to, in his best judgment, provide information to the Department for planning to achieve maximum impact. In comparison with other projects:

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C. Priority Impact (cont'd)

1. Is this project a model for wide diffusion?

[X] YES in urban districts [ ] NO

2. Is this project a model which requires field testing in other districts?

[X] YES [ ] NO Population is a determinant of the type of system

3. Does this project require further development before it can be adopted?

[X] YES [ ] NO

4. Does this project have a potential for high pay-off?

[X] YES [ ] NO

COMMENTS:

The director and principal consultant appear to be working with energy and competence towards inplementing an effective system. However, it is not clear that they are adequately considering the needs of the pupils and the knowledge of experts in terms of setting goals. Documented efforts suggest an overreliance on the opinion of the general public, along with use of an instrument of doubtful interpretability. Project personnel could probably use such information to set up whatever goals they personally felt were best. A careful collection and application of expert opinion - along with public opinion - in setting goals, followed by a screening of pupils relative to their present achievement relative to those goals is recommended as part of the selection of goals for the system. It is likely that the director has something in mind which would take care of this matter, but it has not clearly been made explicit.

While the consultant appears to be acting in good faith, the stated goals of the project do not appear to require an <u>effective</u> PPBS for their achievement.